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Advertising Unit
Montana Tourist Survey

**MONTANA TOURIST
SURVEY**

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TOURIST TRAVEL AND EXPENDITURES IN MONTANA

A Study of Highway Benefits

prepared for
MONTANA STATE HIGHWAY COMMISSION

in cooperation with
U. S. Department of Commerce
Bureau of Public Roads

by
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Montana State University



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I. THE SURVEY DESIGN

Objectives

The primary objective of the study was to compile information about the benefits which result to the tourist industry in Montana from the presence of highways in the state. Admittedly an important part of the state's economy, little is known about tourism in Montana. An important requisite of the study has been to determine what contributions are made by the traveler to the over-all economy of the state. Further, an exploration is made into the characteristics of trip planning and trip behavior. Some of the possible contributions of the study are:

1. To Highway Planning

- a. Assistance in the planning of highway routes could result from knowledge of the travel patterns followed by tourists and the points of interest visited.
- b. Increased ability to estimate tax revenues from gasoline taxes would be provided by information on mileages of outside travelers in the state.
- c. Generally speaking, information on the magnitude of travel by non-residents would seem relevant to the question of the portion of the state's highway costs, which should be borne by its residents.

2. To the Advertising Program of the State Highway Commission

More complete knowledge of the motivating factors behind the vacationer's decision to spend part or all of his vacation in Montana, and of his behavior while in the state can be used to strengthen the advertising program. Better choice of advertising appeals and media will increase the effectiveness of the advertising program.

3. To Private Business

More effective planning by owners of facilities including hotels, motels, resorts, gifts shops, restaurants, service stations, and dude ranches can result from the study. These and other businesses are dependent on the tourist for the bulk of their earnings. Hence, this added knowledge of the character of their market is fundamental to a strengthening of their operations.

Description of the Study

A number of interrelated techniques have been employed to secure required information. These techniques, with a brief statement of their nature, are listed below:

Classification and Analysis of Accommodations List for Montana. During the planning stage of the survey, and before an interviewing sample could be drawn, an attempt was made to compile a complete list of all commercial accommodation establishments in the state. Starting with lists already in existence, efforts were made to secure the names and addresses of additional units. The list of establishments was then classified according to size of place, by highway district, and by Federal Aid Route numbers. These data have been of aid in relating the location of the state's tourist industry to the highway system.

Occupant Survey. At the core of the study is a series of detailed interviews with Montana's tourists. These interviews were derived from contacts made in 79 different hotels and motels located throughout the state and selected on a systematic predetermined basis. The procedure developed was designed to insure an unbiased sample. These interviews of tourist parties in commercial hostleries were augmented by similar interviews conducted in campgrounds selected on a similar sampling basis.

Occupancy Checks. At the accommodations where tourist interviews were conducted a check, or inventory, was made to determine the rate of occupancy in the establishment on a particular day. A breakdown was made of the nature of the occupancy, that is, whether the unit was occupied by a tourist party, business party, or was unoccupied during the night involved.

Operator Interviews. Additional information about the tourist trade during the 1958 tourist season was secured through 139 interviews with operators of motels and hotels located throughout the State of Montana. The sites of these interviews were also systematically predetermined.

Self-administered, Mail-return Tourist Interviews. Information about tourist travel is often obtained by means of mail-in questionnaires, completed by tourists and returned to the gathering group. In order to test this method of data-gathering one thousand questionnaires were left with the operators of twenty widely-scattered hotels and motels in the state. These questionnaires were prepared to produce information essentially the same as in the personally-conducted tourist interviews. Data from this part of the survey are not employed in the substantive findings. Rather, they permit some observations on the validity of this survey technique, which are presented in Appendix A.

Origin and Destination Interviews. Under the supervision of the State of Montana Highway Department a great number of interviews with tourists were conducted at highway check points. These interviews contained basic items of information also obtained from the occupant survey mentioned above. The wide coverage and large sample size employed in this roadside survey provide critical checks with the occupant survey and an independent means of expanding the survey results to Montana's tourist universe.

Methods and Procedures

The tourist population is viewed as consisting of any and all persons spending at least one night away from home on a non-business purpose. While the daily picnicker or Sunday driver is surely using the highway for a pleasurable purpose, there seems no practical way to include this kind of "touring" without inviting a host of additional problems. The definition adopted includes Montanans traveling for pleasure in the state and excludes out-of-staters traveling in Montana for wholly business purposes.

At the outset it was viewed as essential that sampling methods be employed which would permit fair estimates of the absolute levels of total traffic, total expenditures, and other aggregates related to tourism in the state. This requirement made imperative the use of probability samples with known or ascertainable ratios

between the number of units in the population and the units selected in the sample. The requirement that sampling ratios be known necessitated in turn the development of definite frameworks within which the sampling process was to be carried out.

Briefly, the procedure devised for the occupant survey, occupancy checks, and operator interviews constituted a geographically stratified random sample of accommodation places (hotels, motels, and campgrounds) with equal likelihood of selection of any accommodation place within a given strata. From this primary sample of accommodations places was drawn an ultimate sample of occupant units. This was accomplished by listing all occupant units in each establishment selected in the primary sample and sampling these on a systematic basis with predesignated selection ratios. Some occupant units selected were, of course, vacant or occupied by non-tourist parties. The ultimate tourist sample was derived from tourists found in the sample of occupant units. The size of the tourist sample obtained depended on (1) The selection or sampling ratio for accommodations places, (2) the sampling ratio for occupant units within the accommodations places in the primary sample, and (3) the average tourist occupancy rate in accommodations places in Montana during the time the field interviewing was carried out. The tourist sample, with appropriate allowance for tourists not located or refusing to be interviewed, can be projected directly to a count of average daily numbers of tourist parties staying overnight in commercial accommodations and known campgrounds in Montana. The tourist sample is an unbiased representation of the characteristics of average daily tourist occupancy in the state.

Selection of Primary Sampling Units. The primary sampling units in the survey consist of hotels, motels, resorts, etc. selected from a list of 1,127 known establishments in the state. The list was of rather broad coverage, including places which were not likely to cater to the tourist trade. However, any basis for classifying or excluding certain kinds of places prior to actual sampling would have been likely to bias the survey results.

The establishments were grouped by cities and towns within the state. From each town having eight or more establishments, one primary sampling unit was drawn at random for each fifteen places or major fraction thereof. Accommodations places in towns having less than eight listed places were grouped into twelve Highway Districts. Primary sampling units within each district were selected at random according to the same sampling fraction as for the major locations above. Thus we have achieved a selection of primary sampling units proportionately representative of all principal tourist locations in the state, and have included a proportionate sampling of establishments in towns of lesser importance balanced by geographic areas within the state. The primary sampling units were also well distributed in relation to the numbers of establishments found along or accessible from principal highways in the state.

Selection of Occupant Units. The ultimate sampling unit in the survey was the occupant unit . . . a single room or collection of rooms in a motel, hotel, or resort normally rented by the operator to one tourist party. A tourist party is a group of people traveling together for a non-business purpose and sharing major expenses. Actual interviews in the occupant survey were drawn from tourist parties found in occupant units.

Occupant units were selected by checking every occupant unit in accommodations places having fifteen or less occupant units, and every other occupant unit in places having more than fifteen occupant units. The actual fraction of average daily occupant capacity checked varied slightly from these ratios owing to additional procedures employed and conditions encountered in field interviewing. However, the reports of occupant units checks by field interviewers were so designed that the fraction ultimately achieved could be determined.

The Sample of Campgrounds. The sample of campgrounds can be considered in three parts. A list of campgrounds together with the number of sites in each was acquired from Glacier Park. A similar list was provided by the Forest Service for National Forest campgrounds. Third, a list of campgrounds maintained by the State Highway Department, State Park Department, and other public and private agencies was supplied by the Advertising Department of the State Highway Commission.

The campgrounds in Glacier Park were divided into three strata according to size of the campground. One campground was drawn from each strata, and interviews scheduled according to a sampling fraction designed to yield a one in twenty sampling of campers from the entire strata. National Forest campgrounds were grouped by three regions in the state, and one in twenty grounds in each region systematically drawn for interviews with all campers at the site. Campgrounds were drawn in the same "one in twenty" manner from the Highway Department Listing. The list was pre-arranged by highway segments, so that this procedure guaranteed against a biased geographical clustering of interview sites.

Operator Interviews. In addition to the primary sample of accommodations places from which the occupant unit sample and ultimate tourist interviews arose an augmented sample of establishments was drawn for interviews with operators. For each establishment in the primary sample, two additional places were selected (the succeeding two places in the establishment listing). This system was duplicated for an enlarged occupancy check of campgrounds except for the campgrounds in Glacier Park.

The objectives of the larger operator interview sample were severalfold. First, it provided a larger base than the original primary sample for estimating the average number of occupant units per establishment in the original listing of hotels, motels, and resorts. Second, additional questions were asked of the operator which permit two further checks upon the overall occupancy rates of establishments in the state. The first source was a set of questions concerning the occupancy rate in the establishment to date during the current season, how this patronage divided between tourists and non-tourists, and how the tourist business is allocated between in-state and out-of-state parties. The second source was a tabulation, made with the aid of the operator, of occupancy data for the past week, classified by in-state and out-of-state parties. Third, questions related to off-season occupancy were asked from which expansion of summertime to year-round occupancy could be made.

Origin-Destination Survey. An important part of the overall project was the conducting of origin-destination interviews by State Highway Department crews. Seventeen peripheral stations were sampled for approximately three days each during the tourist season. Principal interview questions include state of origin, des-

termination of entire trip, daily destination, duration of entire trip and duration of trip in Montana, and types of accommodations used. Interviews were conducted with tourists both entering and leaving the state, but the survey results included here are based solely on outbound interviews.

The origin-destination phase provided relatively large-scale sample information on basic characteristics of tourist parties, highway use in Montana by tourists, and so forth. Equally important is the value of the origin-destination phase in providing yet another check on projections of aggregate tourist volumes from the detailed field survey and operator interview sample. Estimates of tourist traffic in the state from the roadside survey revealed the size of several segments of tourist traffic excluded by the sampling procedure used in the field interviews. These are tourists traveling in Montana but not staying overnight, and tourists not staying in commercial accommodations or recognized campgrounds. This latter group includes those staying with friends, and those sleeping in automobiles or camping in non-designated places. A further contribution of the State Highway Department consisted in an enlarged set of classification counts conducted during the year from which year-round to summer season out-of-state traffic volume factors were derived. Thus, expansion factors for off-season tourism were available from both traffic counts and information provided by establishment operators.

Additional Precautions Employed. Several other precautions insure projections from the survey against substantial bias. While the original listing of establishments was less than two years old, the tourist business is a notably fluid one. Therefore, independent lists were secured from Chambers of Commerce in a majority of cities and towns in which primary sample units were selected. These lists were checked against the listing used in the sampling, and a supplementary count of establishments not in the original list built up. The size of this supplementary list was used to form an adjustment factor to account for incompleteness in the original establishment listing. Establishments in the original list that had gone out of the tourist industry or were never in it were discovered through the original operator interview sample.

Because it was evident that early season tourist business in the state was quite slow in comparison to previous years, the operator interview sample was recontacted with a return mail interview in early September. The sole purpose of this interview was to make a comparison of late season tourist occupancy with early and midseason rates. Since the field work phase of the project was confined to early and midseason, this comparison provided an adjustment factor to take account of intra-season variation in tourist patronage. It was found that this factor (plus approximately ten percent) was just about offset by the fact that the distribution of actual interviewing by weeks was such as to produce a tourist volume about ten percent higher than the average weekly volume for the summer season. This was judged by a comparison of survey interview dates with the intra-seasonal pattern of entrance at Glacier Park. For this reason, no net adjustment was made for the intra-season distribution of interviewing. The numbers of establishments in which occupancy checks and tourist interviews were conducted on Fridays, Saturdays, and holidays corresponded very closely to the number that proportionate exposure would dictate. Thus, we are quite confident that the survey data permit an unbiased projection to average daily tourist occupancy for the summer season.

FIGURE I-1

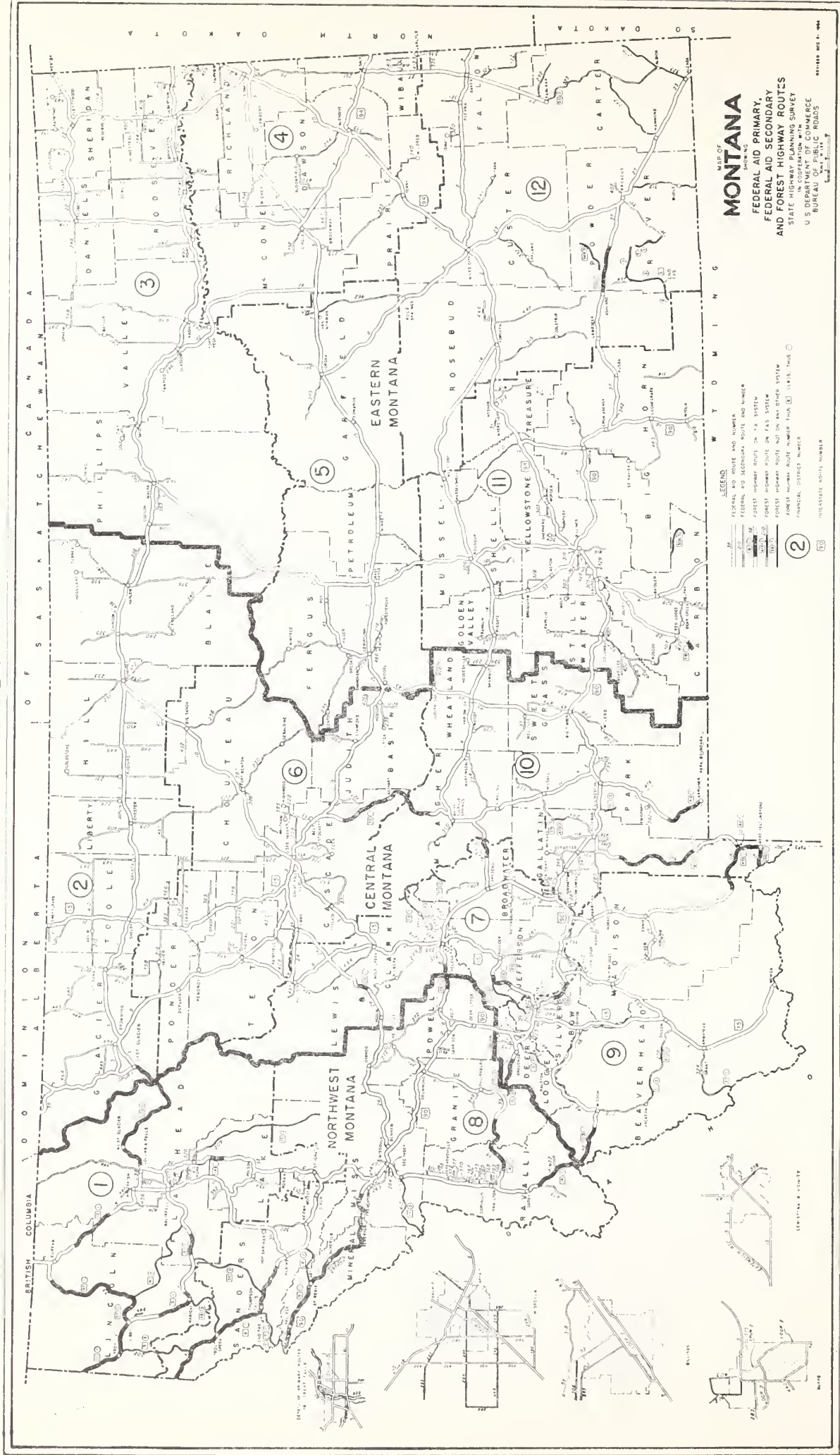
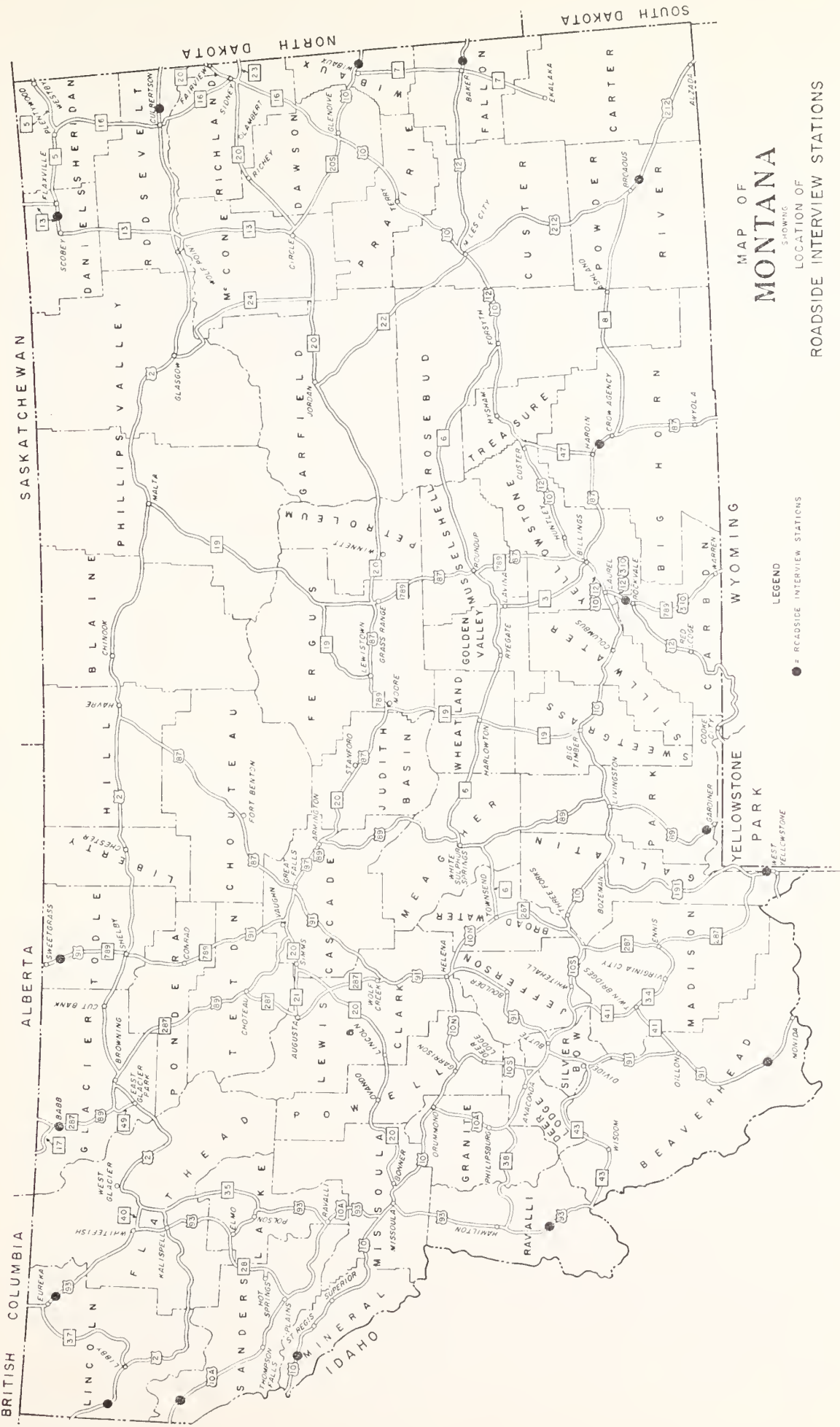


FIGURE I - 2



MAP OF
MONTANA
SHOWING
LOCATION OF
ROADSIDE INTERVIEW STATIONS

LEGEND
● = READSIDE INTERVIEW STATIONS

TABLE I-1

List of Places in Which Occupancy
Check and Operator Interviews Conducted

Place	Number of Primary Sampling Units	Number of Establishments in Occupancy Check*	Number of Establish- ments in Operator Interview Sample*
Northwestern Montana			
Kalispell	3	3	8
Big Fork.....	1	1	3
West Glacier.....	1	1	3
Polson.....	1	1	3
Libby.....	1	---	3
Columbia Falls.....	1	1	3
Whitefish.....	1	1	3
Coram**.....	1	1	3
Lakeside**.....	1	1	3
Marion**.....	1	---	2
Martin City**.....	2	2	6
Missoula.....	3	3	9
Hot Springs.....	2	2	6
Seely Lake.....	1	---	2
Hamilton.....	1	1	3
Drummond.....	1	1	3
Plains**.....	2	2	6
Trout Creek**.....	1	1	3
de Borgia**.....	1	---	3
St. Regis**.....	1	1	3
Total Northwestern Montana.....	27	23	78

TABLE I-1—(Continued)

Place	Number of Primary Sampling Units	Number of Establishments in Occupancy Check*	Number of Establish- ments in Operator Interview Sample*
Central Montana			
Havre.....	2	2	5
Browning**.....	1	....	0
East Glacier.....	1	....	3
Great Falls.....	4	3	10
Choteau**.....	1	1	3
Ft. Benton**.....	1	1	3
McAllister**.....	1	....	3
Helena.....	1	1	2
Augusta.....	1	1	3
Three Forks**.....	2	2	6
Butte.....	2	2	6
Ennis.....	1	1	3
Anaconda.....	1	1	3
Dillon**.....	1	1	3
Divide**.....	1	1	3
Melrose**.....	1	1	3
West Yellowstone.....	6	6	18
Gardiner.....	1	1	3
Bozeman.....	1	1	3
Livingston.....	1	1	2
Cooke City.....	1	1	3
Gallatin Gateway.....	1	1	3
Big Timber.....	1	1	3
Harlowtown**.....	1	1	3
Corwin Springs**.....	1	....	3
Belgrade**.....	1	1	3
Total Central Montana.....	37	32	103

TABLE I-1—(Continued)

Place	Number of Primary Sampling Units	Number of Establishments in Occupancy Check*	Number of Establish- ments in Operator Interview Sample*
Eastern Montana			
Glasgow.....	1	1	3
Hinsdale**.....	1	1	3
Wolf Point**.....	1	1	3
Glendive.....	2	2	6
Sidney**.....	1	1	3
Lewistown.....	1	1	3
Miles City.....	2	2	7
Forsyth.....	1	1	3
Baker.....	1	1	3
Cut Bank-Shelby.....	1	2	3
Billings.....	3	3	9
Red Lodge.....	1	1	3
Laurel.....	1	1	3
Hardin**.....	1	1	3
Roundup**.....	1	1	3
Total Eastern Montana.....	19	20	58
Total All Montana.....	83	75	239

*Includes establishments not catering to tourist trade or not having any tourist business on interview day, but excludes establishments not located or refusing to cooperate. Actual tourist interviews from four additional establishments were added to the survey but not counted in occupancy check since they did not represent primary sampling units drawn in advance. These establishments were located in East Glacier, Great Falls, Helena, and Billings. Thus the tourist interviews resulted from contacts at 79 establishments.

**In "remainder of area" sample. City given is location of establishment originally selected for occupancy check. Other establishments in operator interview sample are not necessarily in the same town, but may be in other small towns in the same Highway Districts.

TABLE I-2
List of Campgrounds in Which Occupancy
Check and Camper Interviews Conducted

I. Glacier National Park

Sprague Creek Campground*
 Many Glacier Campground*
 Cut Bank Campground*

II. National Forests

Flathead National Forest
 Big Creek Number 1*
 Big Creek Number 2**
 Tuchuck**

Lolo National Forest

Copper King*
 Clark Memorial**
 West Fork**

Gallatin National Forest

Aspen*
 Chippy Park**
 Four Mile**
 Cabin Creek**
 Beaver Creek*
 Rock Creek**

Lewis & Clark National Forest

Benchmark*
 Home Gulch**
 Beaver Creek**

Beaverhead National Forest

Lodgepole*
 Willow Creek*
 Little Joe*

II. National Forests (continued)

Deer Lodge National Forest
 Whitehouse*
 Basin Canyon**
 Elder Creek**

Custer National Forest

Sheridan*
 Ratine**
 Parkside*

III. State Forests, State Highway, and Other
 Along U.S. 2

Saveway Picnic Ground—Glasgow**
 Hinsdale Park—Hinsdale**
 American Legion Campground—east
 of Malta**

Along U.S. 10 and 12

Huntley Park**
 Highwayside—west of Forsyth**
 Blue Star Memorial Park—west of
 Miles City**

Along U.S. 91

Lyon's Creek—south of Wolf Creek*
 Picnic Area—south of Melrose*
 Bannock State Monument — west of
 Dillon*

Along Montana 18

Timber Creek Roadside—west of
 Circle**
 Rock Creek State Park—northwest of
 Circle**
 Fort Peck Campground*

*Occupant check and camper interviews conducted.

**Occupant check only conducted.

TABLE I-3
Numbers of Tourist Party Interviews in Occupant Survey

Source	Montanans		Out-of-Staters		Total	
	Actual Number	Adjusted Number	Actual Number	Adjusted Number	Actual Number	Adjusted Number
From Checks of every other occupant unit.....	13	26	79	158	92	184
From Checks of every occupant unit.....	16	16	127	127	143	143
Campgrounds.....	16	16	42	42	58	58
Total.....	45	58	248	327	293	385

TABLE I-4
**Number of Outbound Passenger Vehicles
Counted and Parties Interviewed at Seventeen Peripheral
Stations, Roadside Origin-Destination Survey**

Station	Number of 16 Hour Days Covered	Number of Outbound Vehicles and Interviews
Western Stations		
Troy.....	3.5	806
Noxon.....	2.0	230
Saltese.....	3.0	1,353
Southern Stations		
Sula (Darby).....	2.5	221
Monida.....	3.5	404
West Yellowstone.....	3.5	1,072
Gardiner.....	3.5	777
Rockvale.....	3.0	557
Crow Agency.....	3.5	688
Eastern Stations		
Broadus.....	2.5	107
Baker.....	3.0	393
Wibaux.....	3.5	958
Culbertson.....	4.0	478
Scobey.....	2.0	102
Northern Stations		
Sweetgrass.....	3.5	393
Babb.....	3.5	807
Eureka.....	3.5	89
Total.....	3.15	9,435*

*Including 933 Montanans and 8,502 out-of-staters, 945 parties on business trips and 8,490 on non-business trips.

II. MONTANA'S TOURIST MARKET

Vital to any understanding of Montana's tourist business and its dependence on highway travel is a knowledge of what kinds of tourist parties travel in Montana, where they are from, and where they are going. While other parts of the survey delve into the detail of Montana travel by tourists, basic origin-destination information permits an evaluation of the travel objectives that motivate tourist travel in Montana, and of the total highway use associated with bringing the tourist, whatever his trip objective may be, to the boundaries of the Treasure State. The usefulness of origin-destination material to those seeking to increase tourism in Montana is quite evident. It identifies Montana's tourist market as to permanent residence, and as to objectives of travel apart from Montana. Both aspects are crucial to the planning of truly effective promotional programs.

Occupation of Head of Party

Particularly striking in the occupational breakdown is the large representation among non-Montanans of professional and technical (29%) and of managers, officials, and proprietors (19%). These groups probably represent the higher income levels among the occupational classes used. While these occupations account for almost half of the out-of-staters, they account for only about 30 percent of the Montanans in the sample; the distribution of Montana parties is much more varied by occupational groups than are the non-Montanans. Interesting also is the finding that almost half of the campers are from these higher status higher income occupations. The feeling, expressed by more than a few tourist establishment operators, that the camper is more of a "hobo" than a tourist, is hardly justifiable. The camper is seen here to be typically a person of means comparable to other tourists, who camps out of choice rather than out of necessity. In any event it would not seem that a restriction on further expansion of camping facilities in the state would in any way benefit operators of commercial hostleries. Whether distinguished by taste or by necessity, the camper and the conventional tourist are two distinct markets . . . two separate groups of travelers looking for different experiences and different facilities. Discouraging the camper would not drive him into alternative accommodations; rather it would drive him to alternative areas where camping facilities are more numerous or superior.

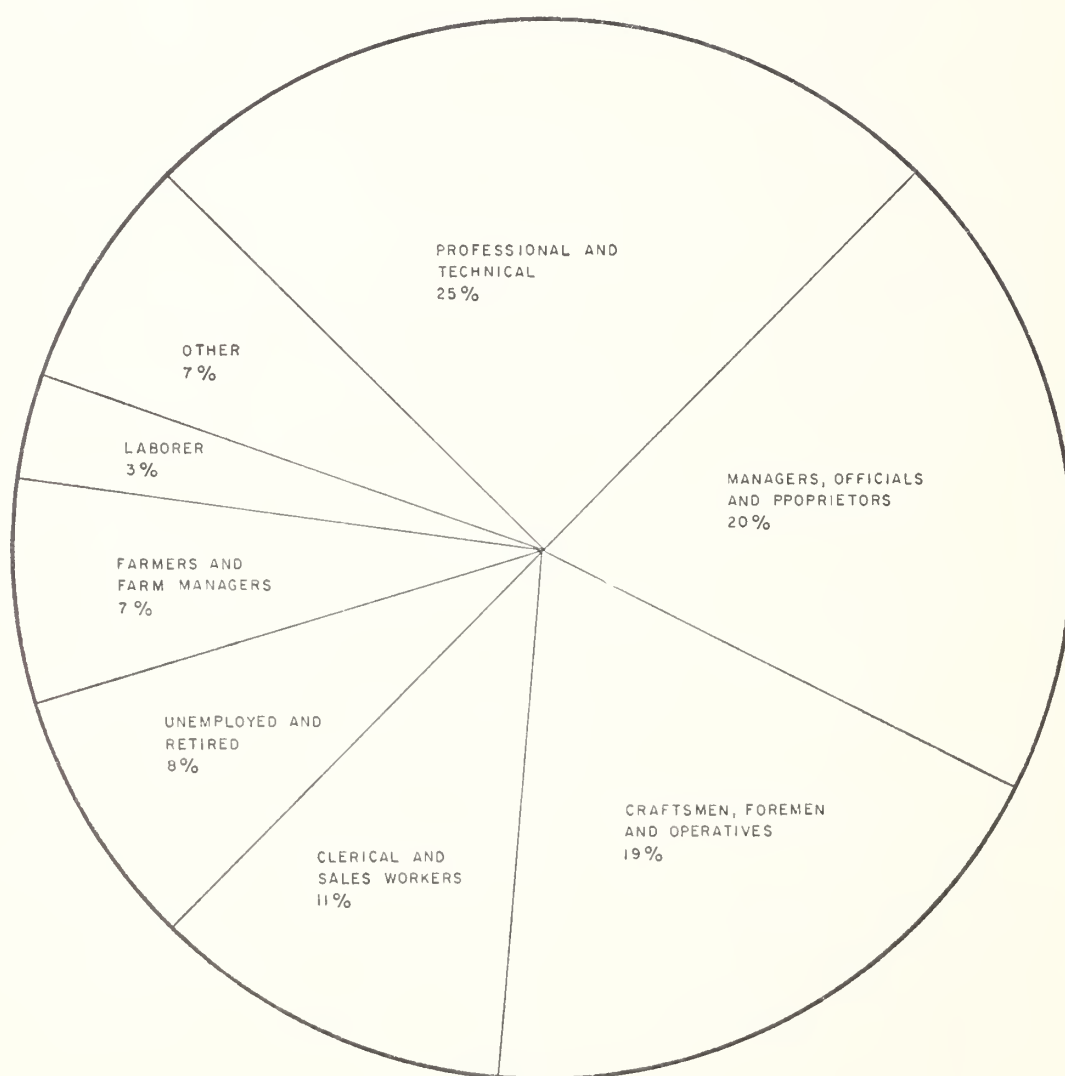
Composition of Tourist Parties

The average size of party numbered 3.2 persons. More than three-quarters of the parties encountered in the accommodations sample numbered two, three, or four persons. Camping parties (3.7) average more persons than non-campers (3.1), and Montanans average more persons per party (3.8) than out-of-staters (3.1). Slightly over half of all parties had no children (18 years or under). The proportion of parties containing no children was lower for Montanans (36%) and for campers (28%). For parties with children, the average number of children was 2.0 for out-of-staters and 2.5 for Montanans.

The apparent ages of adult members of parties were distributed 46 percent from 19 to 40 years, 48 percent from 40 to 60 years, and six percent over 60 years. A

FIGURE II - I

OCCUPATIONAL CLASS OF TOURISTS



larger proportion of Montanans and of campers appear to be under 40 years of age than of out-of-staters and non-campers, the percentage comparisons being approximately 54 percent to 44 percent in both cases.

Vacation Last Year

The typical Montana visitor is an inveterate vacationer, for approximately two-thirds of the respondents took a vacation the previous year. For the camper the proportion was three-fourths. Thirty-eight percent of the Montanans spent their vacation the previous year in their own state, while 13 percent of the out-of-state parties were in Montana on vacation that year. In this non-Montanans group, one-third spent their vacations in the western states, including Montana. Some 28 percent took no vacation, and the remainder visited other areas of the United States and Canada. California, with 5.5 percent, led the parade of states visited, followed by Florida (4%), Washington (3.7%), Minnesota (3.1%), Michigan (2.4%), New York (2.1%) and a host of other states in small amounts.

Origin of Tourists

Both the roadside interviews at the borders and the interviews at overnight accommodations places within the state developed information on the home states of Montana's tourists. The larger number of roadside interviews permits more reliable statements about individual states. When states are grouped for summary purposes, the two sources are in general agreement.

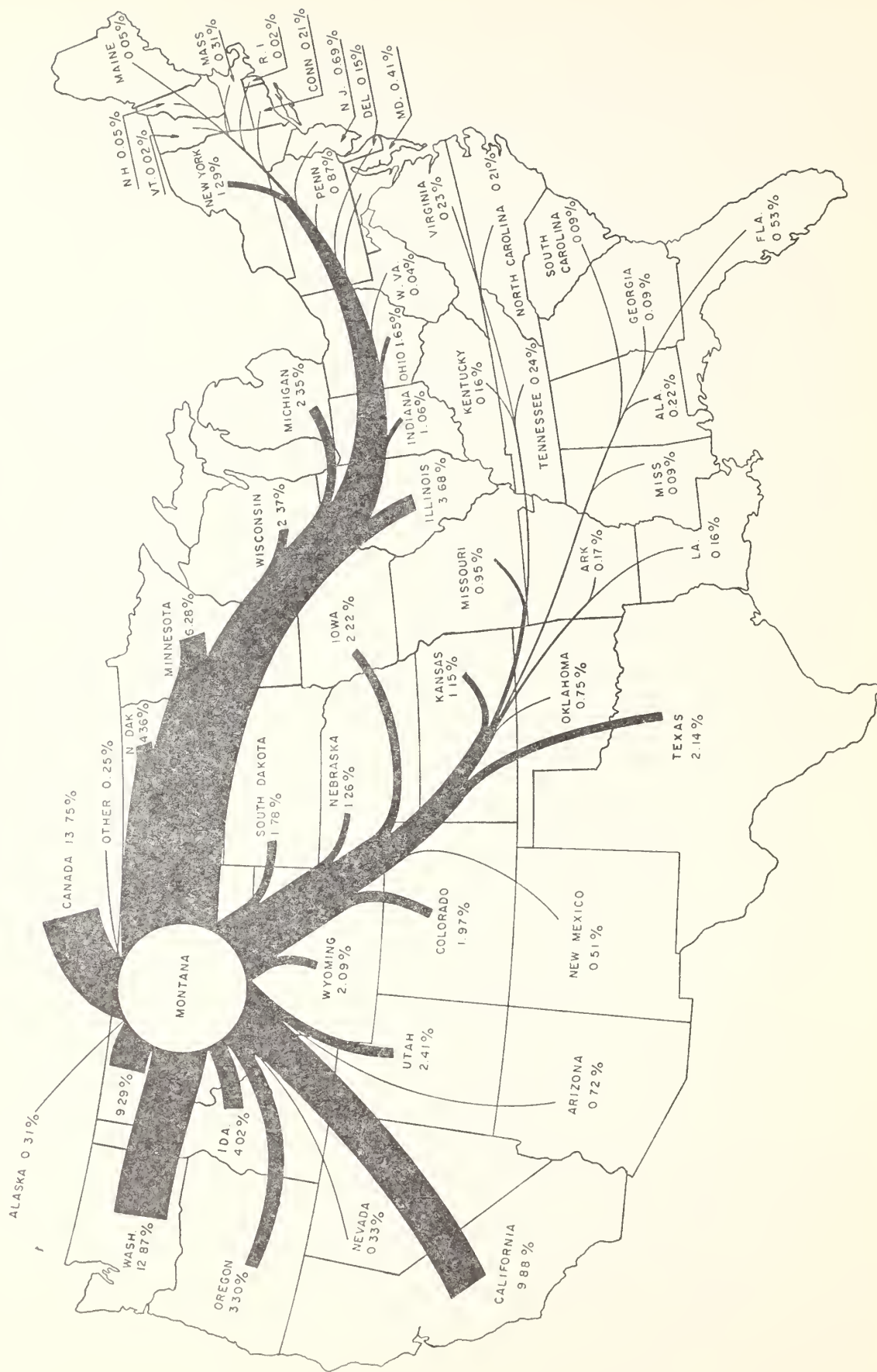
The roadside interviews find that about nine percent of the parties encountered are Montanans. Since these interviews were made on the periphery of the state, this figure underestimates the real contribution of Montanans to their own tourist industry. The figure of about fifteen percent from the establishment occupant sample is probably nearer the mark.

The pattern of origin by individual states can be readily grasped from Table II-3. Canada contributes about 14 percent of Montana's tourists, and the leading individual states are Washington, California, Minnesota, North Dakota, Idaho, and Illinois. Considering groups of states reveals that the west coast supplies 26 percent, and the states adjoining Montana 12 percent of Montana's tourist traffic. Adding these two groups of states to Canadians and Montanans accounts for 61 percent of Montana's tourists. Adding the remaining Rocky Mountain states results in 67 percent, and all states west of the Mississippi account for 82 percent.

Destination of Tourists

The destination of touring parties is significant because it reflects the drawing power of Montana, or the extent to which Montana is an end attraction as opposed to an avenue of access to other states. Motorists leaving the state were asked what was or had been their major trip destination. Thirty-four percent stated Montana. In the occupant survey, respondents were asked their principle destination for the entire trip. In many cases, several answers were given. The proportion of parties mentioning Montana as one of their destinations was 49 percent. This sample included a larger representation of Montanans touring locally, and tabulated the Montana "destinations" in a more generous manner.

FIGURE II - 2
STATE OF ORIGIN OF TOURISTS



Both the roadside interviews and the occupant sample show that Canada and the west coast states together account for over one-third of the major destinations of parties. If the remainder of the Rocky Mountain states are added, it is found that over four-fifths of the destinations are either in Montana, Rocky Mountain and west coast states, or Canada.

Origin-Destination Combinations

There is value in attempting to define Montana's tourist market by "origin-destination" segments. This linkage of where tourists are from and where they are going can be utilized in planning the direction and content of advertising messages emphasizing Montana. If rather broad sections of the country are specified, easterners and midwesterners destined for Montana and for other far west and Rocky Mountain states account for 33 percent of the market (Table II-6). Travelers from far western and Rocky Mountain states with a destination in Montana account for 13 percent, Montanans visiting attractions in their own state contribute 11 percent, Canadians with destinations in Montana and westerners destined for western states other than Montana each contribute about 10 percent. The remaining one-fourth of the market is highly scattered.

If one tries to pinpoint origin-destination combinations by pairs of states, he necessarily must deal with smaller market segments. Nevertheless the detail is suggestive. In Table II-7 can be found Canadians traveling to Canada, to Montana, and to Washington; Washingtonians destined for Montana, Canada, and Minnesota; Californians traveling to Montana and Canada; and Minnesotans to Montana and Washington. It would seem that people living in areas of scenic splendor and outdoor living are visiting other areas offering fundamentally the same attraction. The real motivating factors, then, must be found in variety, new experience, curiosity, novelty, adventure, etc. rather than in scenic splendor and the great outdoors alone. Many have these right where they are.

Much the same picture is obtained from tourists' statements of the high points of their trips. In the occupant survey, about one-half of the out-of-state parties mention a specific point in Montana or Montana in general as a trip "high point." Of the remainder, 44 percent do not indicate any state in particular. Of the particular state mentions, Idaho, California, Washington, and Oregon have 35 percent, the remaining Rocky Mountain states 33 percent, and Canada, chiefly the western provinces, 22 percent.

TABLE II-1
Occupational Class of Head of Party,
Occupant Survey, Summer 1958

Occupational Class	All Respondents %	Montanans %	Out-of-Staters %	Campers %
Professional and Technical.....	25.3	5	29	31
Farmers and Farm Managers.....	6.6	18	5	....
Managers, Officials, Proprietors.	19.6	24	19	17
Clerical and Sales Workers.....	11.1	18	10	10
Craftsmen, Foremen, Operatives.	18.6	18	18	16
Laborers.....	3.4	9	2	5
Unemployed and Retired.....	8.0	4	9	9
Other.....	7.4	4	8	12
Total Respondents.....	100.0	100	100	100

TABLE II-2
Size of Tourist Parties in Occupant Survey
Summer 1958

Persons in Party	Percentage of Parties
One.....	6.2
Two.....	35.7
Three.....	18.7
Four.....	22.4
Five.....	10.6
Six.....	4.4
Seven.....	0.5
Eight.....	1.0
Nine & Over.....	0.5
Total Parties.....	100.0

TABLE II-3
Origin and Destination of Parties Leaving
Montana at Seventeen Roadside Check Points,
Summer 1958

State	Percentage of Destinations <i>Origins</i>	Percentage of Origins <i>Dest</i>
Alabama.....	.22	.05
Arizona.....	.72	.29
Arkansas.....	.17	.10
California.....	9.88	5.07
Colorado.....	1.97	.86
Connecticut.....	.21	.05
Delaware.....	.15	.11
Florida.....	.53	.21
Georgia.....	.09	.05
Idaho.....	4.02	3.03
Illinois.....	3.68	.71
Indiana.....	1.06	.21
Iowa.....	2.22	.46
Kansas.....	1.15	.16
Kentucky.....	.16	.03
Louisiana.....	.16	.04
Maine.....	.05	.11
Maryland.....	.41	.05
Massachusetts.....	.31	.16
Michigan.....	2.35	.55
Minnesota.....	6.28	3.03
Mississippi.....	.09	.02
Missouri.....	.95	.29
Montana.....	9.29	33.61
Nebraska.....	1.26	.57
Nevada.....	.33	.34
New Hampshire.....	.05	.06
New Jersey.....	.69	.10
New Mexico.....	.51	.13
New York.....	1.29	1.21
North Carolina.....	.21	.04
North Dakota.....	4.36	3.59
Ohio.....	1.65	.35
Oklahoma.....	.75	.16
Oregon.....	3.30	2.83
Pennsylvania.....	.87	.24
Rhode Island.....	.02	.02
South Carolina.....	.09	.45
South Dakota.....	1.78	1.62
Tennessee.....	.24	.13
Texas.....	2.14	.24
Utah.....	2.41	1.20
Vermont.....	.02	.01
Virginia.....	.23	.08
Washington.....	12.87	12.31
West Virginia.....	.04	.02
Wisconsin.....	2.37	.66
Wyoming.....	2.09	2.20
Canada.....	13.75	20.51
Alaska.....	.31	1.10
Other.....	.25	.58
Total.....	100.00	100.00

TABLE II-4
Distribution of Respondents by State of Origin,
Occupancy Survey, Summer 1958

State of Origin	All Respondents Percent	Respondents with Montana Destinations Percent	Respondents without Montana Destinations Percent
Montana.....	15.3	21.4	9.4
Idaho.....	3.2		
Wyoming.....	2.1		
N. & S. Dakota.....	4.5		
Calif., Wash., Ore.....	11.3		
Utah, Col., Nev.....	6.1		
Ariz., N. Mexico.....	0.8		
Western U. S.....	28.0	27.8	28.1
Canada.....	16.6	16.0	17.2
Other U. S.....	39.6	34.8	44.3
Other.....	0.5	---	1.0
Total.....	100.0	100.0	100.0

TABLE II-5
Distributions of Trip Destinations and Farthest Points
Visited by State Groupings and Leading States,
Occupant Survey

States	Percent of Total Respondents Trip Destinations Farthest Point Visited	
Montana.....	49.1	49.7
Idaho, Wyoming, North and South Dakota.....	21.8	10.1
California, Washington, Oregon.....	9.7	20.0
Colorado, Utah, Arizona, Nevada, New Mexico.....	0.8	1.1
Other U. S.....	5.0	4.0
Canada.....	13.6	15.1
Total.....	100.0	100.0
Montana.....	49.1	49.8
Washington.....	13.6	14.6
California.....	6.2	4.0
Alberta.....	5.8	6.6
British Columbia.....	3.9	4.5
North Dakota.....	3.5	2.7
Idaho.....	3.1	4.0
Total.....	85.2	86.2

TABLE II-6
Distribution of Party-days in Montana
by Origin-Destination Segments, Occupant Survey,
Summer 1958

Area of Destination	Montana	Western U. S.	Area of Origin Other U. S.	Canada	TOTAL
Montana.....	10.8	13.0	17.1	9.5	50.4
Western U. S.*..	1.6	9.8	16.3	3.2	30.9
Other U. S.**.....	1.1	2.2	0.5	0.3	4.1
Canada.....	1.1	3.5	6.2	3.8	14.6
Total.....	14.6	28.5	40.1	16.8	100.0

*California, Oregon, Washington, North Dakota, South Dakota, Wyoming, Idaho, Utah, Colorado, Arizona, Nevada, New Mexico.

**All states excluding Montana and Western U. S.

TABLE II-7
Leading Origin-Destination Segments by States,
Parties Leaving Montana at Seventeen Roadside
Check Points, Summer 1958

State of Origin- State of Destination	Percentage of All Parties
Canada-Canada.....	5.9
Washington-Montana.....	5.2
California-Montana.....	3.8
Canada-Montana.....	3.6
Montana-Montana.....	3.0
Minnesota-Montana.....	2.4
California-Canada.....	2.4
Idaho-Montana.....	2.1
North Dakota-Montana.....	2.1
Wyoming-Montana.....	1.5
Utah-Montana.....	1.4
Illinois-Montana.....	1.3
Minnesota-Washington.....	1.3
Canada-Washington.....	1.2
Oregon-Montana.....	1.2
Washington-Minnesota.....	1.0
Colorado-Montana.....	1.0
Washington-Canada.....	1.0
Total Leading Segments.....	41.4

III. PLANNING THE TRIP

The planning phase of any vacationer's trip is surely crucial to the area wishing to attract the tourist. It is at this stage that the decisions are made not only about where to go, but also how long to be away, how much money to spend, what route to take, and where to stop en route. Yet, little is actually known about the process of vacation trip planning. Therefore, in the occupant survey, a number of questions explored this often neglected segment of the tourist picture.

Time of Trip Decision

A large group of out-of-state vacationers in Montana tends to make its decisions about the vacation trip within three months of actual arrival here. At any rate, 45.5 percent of the respondents so indicated with 29.3 percent stating the decision was made within the past month, 10.6 percent said the decision was made two months previously, and 5.6 percent three months before. Another group is longer-ranged in its planning; 18.9 percent decided approximately six months before coming; 24.2 percent approximately a year ago; and 5.6 percent over a year ago. The third group, the true "regulars," consisting of 5.8 percent of the respondents, makes the same trip every year. The data indicate that appreciable groups of potential visitors to Montana are in the decision-making phase at all times of the year, although the heaviest concentration of decisions is to be found in the months just prior to our summer tourist season.

As might be expected, Montanans, when planning vacation trips in Montana, do less advance planning than visitors from far away places. Most of the decisions (56%) are made in the month of the trip, while 13 percent take less than two months. It is interesting that 15 percent of the home state group make their Montana vacation trip on a regular basis. The remainder, some 16 percent, constitute the advance planning group which is quite small. The planning period for vacation trips in the tourists' home state seems to be a matter of weeks rather than long-contemplated planning.

Advance planning by campers was not found to be significantly different from all tourists.

Origination of the Trip Idea

Who in the family group presents the idea of a vacation trip which includes Montana? For all practical purposes, this decision originates in the mind of one of the spouses, or as a joint husband-wife idea. In 27 percent of the cases the husband is the source, while the wife is the thought leader 26 percent of the time. Adding to this figure the 32 percent joint decisions, we find that in 85 percent of the visits to our state the husband and/or wife have been influential in making the trip decision. This pattern is found for Montanans and non-Montanans alike. In the case of campers, the sole source of the idea came from the husband 50 percent of the time.

The Influence of Prior Visits to Montana

There are many varied forces in operation when a family decides upon a site for its vacation activities. Certainly past experience is an important force. Many

persons are creatures of habit, returning year after year to the same place for their vacation. Other persons have a number of favorite spots which they revisit following some sort of informal rotational plan.

For the entire sample of out-of-staters in the occupant survey, 58 percent had been here before, leaving 42 percent of the group as absolute new comers. Fifty-two percent had experienced Montana as a vacation spot, and four percent had been here on business. The Canadian visitor furnishes an interesting comparison, for 70 percent of this group had vacationed here before, and 26 percent were on their first visit. Four percent had come previously on business and none had lived here. When the sample is broken down into camper and non-camper groups we find that a much larger proportion of campers had vacationed here before (76%) than for non-campers (48%). When residents of the western states and Canada are taken out, we find that in the group from other states in the United States 39 percent had been in Montana on a previous vacation trip, and two percent on business. Westerners, on the other hand, furnished a breakdown of 61 percent previously in the state on a vacation, and eight percent with prior business trips.

Friends and Relatives as Trip Influences

Nearly one-half (46.3%) of our visitors have either friends or relatives who have visited Montana. For western state residents the proportion is much higher (62%) than in Canada (43%) and the rest of the United States (38%). It is assumed that these friends and relatives had given impressions of their earlier trip which provided a form of "word-of-mouth" advertising. Campers apparently are less influenced by what their associates do during their vacation time, as only 13 percent of them indicate that their friends or relatives had visited Montana, contrasted with 52 percent of the non-campers.

Friends and relatives who live in a vacation area can also influence vacation planning. Nearly one-fifth (19.5%) of the respondents indicated that they had friends or relatives living in Montana. More than one-half (58%) of those visitors who would see friends or relatives in the state stated that they would spend some nights with them. Of all the respondents 11 percent would spend some nights in private homes as guests. The average length of such stays equalled the overall stay in Montana. Thus, one night in ten among the group found in commercial establishments and campgrounds is used up in visits in the homes of friends and relatives. These private hosts attract, at least in part, an appreciable number of our visitors who contribute to our economy in other ways. Local residents should be encouraged in their efforts to induce friends and relatives to visit the Treasure State.

Duration of Trip

The average duration of all trips encountered in the "outbound" roadside interviews was 21.2 days, and in the occupant survey 18.6 days. Some of this difference can be accounted for by the larger proportion of Montanans in the occupant survey. Trip durations by different segments of the touring population have interesting implications. In the roadside interviews, non-Montanans with major destinations in states other than Montana averaged twenty-six days away from home,

compared with sixteen days for non-Montanans with major destination in Montana. Montanans traveling to other states averaged fourteen days, and Montanans with a major destination in Montana averaged four to five days.

In the occupant sample, non-Montanans averaged twenty-one days, and Montanans eight days. This figure for Montanans is more representative than the roadside survey figure for Montanans traveling largely within the confines of their own state. Campers averaged twenty-five days and non-campers between seventeen and eighteen. Total trip length of all tourists with a destination in Montana (some may have had major destinations outside Montana as well) averaged fourteen days, while the average for tourists without a major destination in Montana was almost twenty-three days.

State of origin groupings within the sample at accommodation places reveal longer average trip durations with increasing distance from Montana. The range is from about fourteen days from states bordering on Montana (Idaho, Wyoming, North and South Dakota) and Canada, to almost twenty-five days for those states east of the Rocky Mountain area.

Amount Budgeted for the Trip

Before delving into travel budgets an effort was made to ascertain if the trip was the principal vacation trip of the respondent. Ninety percent of all respondents were on such a trip, (93% for out-of-staters and 74% for Montanans). In the case of campers, only 80 percent considered their present trip to be their principal vacation trip.

Some vacationers (5.4%) had set aside less than \$75 to finance their trip, while some parties (0.9%) planned to spend in excess of \$2,175. An examination of Table III-3 will show that approximately 80 percent of the parties had budgets ranging from \$75 to \$525. The mean average was \$411, and the median, \$300. Two-thirds of the respondents spent in the range of \$200-\$500.

When a comparison is made between the amount budgeted and the length of trip we find for the entire sample \$411 budgeted and a trip duration of 18.6 days, yielding an average budgeted cost per day for the trip of \$22.10. Persons with Montana destinations had budgets averaging about \$300 and those with other destinations averaged close to \$500 budgeted for the entire trip. On a per day budgeted basis, however, both groups are quite close together. Campers budgeted more money (\$442) for their trips but trip duration was almost eight days longer (27.1 days). Thus, their average daily budget was \$16.31.

When asked if this principal vacation trip of the year 1958 was costing the same amount as its counterpart in previous years, more than half (56.7%) answered in the affirmative. A small group (4.7%) were spending less than usual, while 38.6 percent were spending more than they customarily did. However, only 29 percent of the respondents with Montana destinations were spending more, contrasted with 47 percent for parties with no destination in Montana. We must conclude that persons coming on vacation trips with destinations in Montana expect such trips to be relatively less expensive than trips to other areas.

When these data are broken down by regions of origin, some interesting patterns develop. In the Montana tourist classification 11 percent budgeted less and 25 percent budgeted more than the previous year. Other western states residents

also planned to spend less. Many Canadian tourists, on the other hand, felt their 1958 trip would be more expensive, with 44 percent of this group so indicating. Residents from states other than those located in the western part of the United States noted that they expected to spend more in 50 percent of their responses. Thus, a trip to the United States by Canadians, or a trip to Montana and the west by residents of states in the east, south, and middle west regions of our country, is thought to be a relatively expensive vacation; such a trip is looked upon as relatively less expensive by westerners.

Planning of Stop-overs and Routing

While tourists in Montana may plan their vacation trips in a general fashion, such advance planning does not extend to day-to-day details. This conclusion emerges from responses to two types of questions: (1) three questions dealing with the prior planning of overnight stops; and (2) questions dealing with outside assistance in planning the trip routing.

Out-of-state residents touring in Montana did less planning than Montanans, for 62 percent of this group indicated they made no advance reservations nor did they plan overnight stops in advance. Fifty percent of the Montanans indicated the same carefree attitude. Twelve percent of the Montanans planned stops and made reservations in advance, as contrasted with six percent for "out-of-state" tourists. In the group planning stops but not making reservations the proportions were 30 percent and 15 percent. There was a scattering of other possible combinations such as planning some stops with or without reservations. Campers apparently do less planning as the proportion of respondents in this group who indicated they made no plans was 66 percent compared with 59 percent for non-campers.

The implications of these findings for the operation of overnight accommodations is apparent. If an individual proprietor wishes to participate in receiving business from this big group of tourists who do not plan overnight stops or make advance reservations, he must present an attractive face to the passing motorist. Furthermore, his place of business must be readily seen from the road and quite possibly advertised down the highway on the approaches to his establishment. Of course, the correct selection of the site in relation to routes of travel is important, too. The location must be in a logical place for overnight stops when a normal tourist's travel pattern is taken into consideration.

The failure to seek assistance in planning a vacation trip does not present a *prima facie* case for the contention that Montana tourists are very informal in their vacation planning. Rather, the contrary attitude of actively seeking assistance seems to reveal a type of person who wants to know where he is going, even when on vacation. At any rate, 30 percent of tourists in Montana indicated they did receive advance aid in their trip planning. The sources are approximately equally divided among auto clubs and travel agencies, on the one hand, and routings by the major oil companies on the other. Obviously, these two groups should be cultivated by those responsible for the expansion of our tourist travel.

Coupled with the findings respecting advance planning of overnight stops and making advance reservations, it seems fair to say that most of Montana's tourists plan as they go. When such is the case, increased emphasis on finding ways to in-

duce the tourist to tarry is in order. Roadside signs and printed brochures distributed to the tourist after he already is in the State of Montana could do much to persuade the visitor to tarry a day or more longer in the Treasure State. Here is a relatively unexplored aspect of the tourist promotional picture.

Advertising as a Force in Vacation Planning

There are many forces operating when a family decides on the locus for its vacation. Certainly the recommendations of friends and relatives are seriously considered. The individual experiences of family members may be influential, that is, one member of the family may have previously visited the area and urges a trip there by the whole group. Our study clearly shows that, for Montana at least, prior visitors constitute an extremely important segment of tourists in the state.

The State of Montana, through the activities of the Advertising Department of the State Highway Department, is making a concerted effort to persuade vacationers they should spend all, or a portion, of their vacation in the Treasure State. This program is formalized through such devices as: newspaper and magazine advertising, sending of promotional literature through the mails (usually in response to inquiries), appearances at travel shows, publicity releases, publication of brochures and maps of the state and its tourist attractions, and similar approaches.

When out-of-state residents touring in Montana were asked if they had seen any of the above-mentioned advertising of the state, slightly more than one-third (35.2%) indicated that they had. For those who had a Montana destination 38 percent recalled being exposed to such messages as contrasted with 32 percent for the group not having a destination in the state. Those parties staying in the state for periods of four or more nights had an exposure rating of 39 percent while those persons whose stays were for a shorter time saw Montana advertising in only 31 percent of the cases. These two breakdowns tend to indicate that advertising helps to get persons to come to Montana and to stay here longer. Campers seem to be influenced by advertising considerably more than non-campers, as the former group indicated a 45 percent exposure rate while the latter group experienced a rate of only 34 percent.

An interesting sidelight on the question of the influence of advertising on the Montana tourist traffic is the determination of the relative effectiveness of such advertising compared to that of other state promotional efforts. It was found nearly 70 percent of the out-of-state travelers in Montana recalled seeing advertising of other states as tourist attractions. Thus, it is fair to say that the typical tourist feels the impact of such advertising. The states which were most often mentioned were: Wyoming, 14 percent; Washington, 12 percent; California, seven percent; Idaho and Colorado, six percent each. None of these states would seem to be doing a better job than Montana with a 35 percent remembrance figure. Of course, the people queried were already in the state which introduces a decided bias in the responses. Therefore, only a tenuous conclusion that Montana advertising is doing a good job can be drawn. That conclusion is based on circumstantial evidence. If, on the other hand, a particular state's advertising had secured a higher rating than Montana's, the results would have been more meaningful.

TABLE III-1
Previous Visits to Montana of Out-of-State Tourist Parties and
Their Friends or Relatives by Origin of Parties, Occupant Survey

Origin of Party	Percent of Parties Visiting Montana on		Percent of Parties with Members		Percent of Parties Having Friends or Relatives Previously Visiting Montana
	Vacation	Business	With No Previous Montana Experience		
All Out-of-State.....	48	4	48		46
Western U. S.*	61	8	31		62
Other U. S.**	39	2	59		38
Canada.....	70	4	26		43

*California, Oregon, Washington, North Dakota, South Dakota, Wyoming, Idaho, Utah, Colorado, Arizona, Nevada, New Mexico.

**All states excluding Montana and Western U. S.

TABLE III-2
Average Amounts Budgeted and Average Durations
of Entire Trip by Origin of Parties, Occupant Survey

State of Origin	Average Amount Budgeted (\$)	Average Trip Duration (Days)	Implied Expendi- ture per Day (\$)
Montana.....	170	7.8	21.79
Idaho, Wyoming, North and South Dakota.....	317	13.6	23.31
California, Washington, Oregon.....	257	17.9	14.36
Utah, Colorado, Nevada, Arizona, New Mexico.....	397	22.5	17.64
Western U. S.....	312	17.5	17.83
Canada.....	341	14.2	24.01
Other U. S.....	576	24.6	23.41
All Sample.....	411	18.6	22.10

TABLE III-3
Distribution of Amounts Budgeted for Trip,
Occupant Survey

Amount Budgeted \$	Percent of Respondents
Under \$ 75.....	5.4
\$ 75 and under 225.....	27.0
225 and under 375.....	23.7
375 and under 525.....	28.9
525 and under 675.....	5.4
675 and under 825.....	2.9
825 and under 975.....	1.6
975 and under 1,275.....	2.6
1,275 and under 1,575.....	0.3
1,575 and under 2,175.....	1.3
2,175 and under 2,675.....	0.6
Over 2,675.....	0.3
Total	100.0

TABLE III-4
Trip Planning by Montanans and Out-of-Staters,
Occupant Survey

Aspect of Planning	Percent of Respondents	
	Montanans	Out-of-Staters
Planning Stops		
Plan all stops in advance.....	42	21
Plan some stops in advance.....	4	10
Plan stops daily.....	4	7
No advance planning.....	50	62
Total.....	100	100
Making Reservations		
Make all reservations in advance.....	12	7
Make some reservations in advance.....	.....	3
Make no reservations in advance.....	88	90
Total.....	100	100
Seeking Aid in Selecting Routes		
From auto clubs and travel agencies.....	.....	16
From oil companies.....	3	15
From friends, relatives, etc.....	.....	2
From other sources.....	.....	2
Received no aid.....	97	65
Total.....	100	100

IV. TOURIST TRAVEL IN MONTANA

Both surveys developed a variety of information on tourist travel in Montana. From these data on points of entry and exit, routes of travel, distances traveled per day, and total mileage in Montana can be derived measures of use of Montana's highway system by tourists which can be set against the expenditures of tourists in Montana. From this will begin to emerge the picture of the contribution of highways to the tourist industry of the state. Highway travel outside the state by tourists with a destination in Montana can also be considered as a benefit of the highway system to the local tourist industry. To the degree that travel in Montana is undertaken to gain access to vacation destinations in other states, this use of highways might best be regarded as a benefit to the tourist industry of these other states, although some direct expenditures in Montana are made by these travelers as well as others. Distinctions of this kind may well prove useful in outlining the character of highway benefits to a state's tourist industry.

An important distinction between the "populations" sampled by the two major surveys deserves emphasis again. Data from the roadside interviews reflect the travel pattern of a sample of all visitors to the state. Each visitor had an equal chance of inclusion in this sample, regardless of his length of stay in the state. The travel data from the occupant sample yields a picture of the travel pattern of tourists in the state on any given day. The likelihood of inclusion of any tourist party in this sample is directly proportional to the number of nights spent in commercial tourist accommodations in Montana. The first gives a picture of the average tourist party, the other a picture of the average daily occupants of commercial and camping accommodations.

Length of Stay in Montana

The average duration in Montana for outbound tourists encountered in the roadside interviewing was 3.7 nights in Montana. For all out-of-state parties, who comprise 90 percent of this sample, the average was 4.0 nights. The average for those staying in motels, hotels, and campers was 3.2 nights. This group, which accounts for 72 percent of the tourist parties and 64 percent of the nights spent by tourist parties in Montana, corresponds generally to the coverage of the "accommodations" sample. The average stay in Montana derived from the occupant sample was 2.7 nights. This is still low in comparison with the larger roadside sample. The roadside sample of outbound parties staying the previous night in motels yielded an average stay of 2.9 nights. This can be compared with 2.8 nights for non-Montanans in the occupant survey. While the stay for those using hotel accommodations is somewhat larger, the proportion of tourist parties or of occupant nights in Montana accounted for by hotel occupancy is small in comparison with motels. All in all, it is doubtful, both from the roadside and accommodations interviews, if the average stay in Montana for those using standard commercial accommodations is any more than a shade over three days.

Keeping in mind that the average stays in the accommodations sample are lower, because of the composition of that sample, some sub-group differences can be examined with profit. Montanans and those from neighboring states averaged only 2.3 nights in Montana, and Canadians 2.0 nights. Those from other Rocky Mountain

states and the west coast averaged close to four nights, while travelers from the remainder of the United States were at about the average. Of course, many of the trips by Montanans, her neighboring states, and Canadians may not be the major vacation trip of the year, and may not be the only trip to Montana during the year. This possibility is less likely for those from the remaining western states and the rest of the country. Contrasting these two groups, it may be significant that other westerners, in a position to know Montana better, stay a full day longer on the average than tourists from the rest of the country, despite the fact that their total trip duration averages almost five days less. The average stay for those from the east and midwest is barely more than would be required to cross Montana with a pause here and there.

The distribution of parties and of total nights in Montana according to length of stay in Montana is shown in the Table IV-1. Some very significant figures can be read there. For example, those staying three days or less in Montana account for 74 percent of all parties but only 30 percent of the nights spent in Montana. The latter figure is more indicative of the importance of this group to the commercial tourist business in Montana. The nineteen percent of all parties who stay from four to nine days in Montana account for 30 percent of the nights spent in Montana. Finally, the very few parties (7%) who spend ten days or more in Montana account for 40 percent of the time spent by tourists in the state. This is a considerable degree of market concentration, but it should be kept in mind that it may not apply equally to those staying in commercial and those in non-commercial accommodations places.

That there is a great potential for the Montana tourist industry in simply extending the length of stay of the current traffic of visitors in the state is fairly self-evident. This fact is lent emphasis by relating the length of total trips to duration of stay in Montana. In the occupant sample, those staying one, two or three nights in Montana were on trips whose average duration was 16.4 days, a relationship of over seven days outside Montana to each day within the state. The corresponding ratio for those staying from four to nine days in Montana was 2.7 days outside the state to each day in Montana. There is an untapped potential here as well. Less room for expansion exists in the group spending ten or more nights in Montana, who average only half a day outside the state per day in Montana. The average stay in Montana of 17 nights for this group leaves only eight days outside the state during the trip. Clearly for this group travel outside the state is incidental to the principal vacation objective in Montana.

The roadside interviews lend themselves to a determination of the average stay in Montana for groups engaged in trips of varying total duration. These results, also summarized in Table IV-1, show that with increasing total trip duration, length of stay in Montana rises fairly quickly to three nights, reaching this level at a total trip duration of around ten days. Thereafter, length of stay in Montana rises to about the three and one-half night level, but increases only very slowly with increasing total trip duration up to 30 days. (The group whose total trip duration exceeds 30 days is largely responsible for pulling the average nights spent in Montana up to 3.7). Again the tremendous potential in the form of a large traffic of tourists with considerable time at their disposal is evident. It is also evident that the potential is largely untapped.

Points of Entry and Exit

Material on traffic flow by entrance and exit from the state is available from both the occupant survey and the outbound roadside interviews. It should be remembered that they reveal quite different facts, however. From the occupant survey data we can learn what proportion of the average daily occupancy of covered accommodation places entered or left the state at various points. The corresponding roadside survey data reveal the proportion of visitors to the state who enter or leave at the several points. The essential difference is between party-days and parties as the basic unit of count. For instance, those entering from the west comprise 32 percent of all parties but account for only 23 percent of total party-days, while those entering from the south total 26 percent of all parties but account for 37 percent of party-days. Were the populations covered by the two samples exactly comparable, this would mean that those entering from the west spend less days on the average in Montana than tourists entering from the south, and indeed this is probably the case even though the occupancy sample omits the non-commercial, non-camper segment of the tourist population covered by the roadside survey.

It is interesting that as measured by total visitors, the balance of traffic flow involves primarily western and southern boundary points (38%), and that the percentage is quite close when placed on a party-day basis (40%). However, the balance of this traffic moves toward southern exits (25%) if one considers numbers of visitors, but shifts toward western exits (22%) if one considers party-days accounted for.

If one considers the various entry-exit combinations in Table IV-3, keeping in mind that a higher percentage of party-days than of parties for a particular combination indicates that parties traveling that general route stay longer than average in the state, an interesting pattern of differences emerges. The entry-exit combinations suggesting below average stays in the state include all of the movements in both directions on a north-south or east-west axis, while the movements suggesting longer than average stays are made up entirely of "diagonal" traffic flows or of those who enter and leave the state at the same boundary. Among those entering from and leaving in the same direction, only those entering and leaving by southern routes seem to have lower than average stays, and in this case the deficit of party-days is not large.

A further slant on tourist traffic movement is presented in Table IV-4. Here, for particular important entering points, is presented the balance of movement among "turn-around," "transverse," and "diagonal" components. Here we see the substantial "turn-around" traffic at particular stations (West Yellowstone, Sweetgrass, Troy), and the fact that return traffic is higher than many perhaps would suspect. The substantial component of "transverse" or traffic proceeding to the opposite border from eastern and northern stations, and the "diagonal" movements from western and southern stations are also apparent.

General Routing Within Montana

The routes taken by tourists were examined and classified according to whether they seemed to be a direct or an indirect routing between point of entry and point of exit. While the determination is necessarily somewhat arbitrary, the per-

centage of out-of-staters with "direct" routings was 53. However, whether a routing was direct or indirect seemed to bear little or no relationship to whether the party had a specific trip destination in Montana. Seventy percent of the Montanans in the sample were found to have taken a direct routing from point of origin to objective and return. The percentage of travelers taking an indirect routing does not drop below fifty until the length of stay in the state approaches one week.

The areas of the state that the tourist had traveled or would travel in were also noted. Sixty-six percent of the parties had traveled or would travel in northwestern Montana, 87 percent in central, and 58 percent in eastern Montana. It may be stated that the "average" tourist in Montana travels some in two of these three broad sectors of the state. The lack of complete coverage of the state by many tourists is seen in the fact that only 30 percent of those interviewed in northwestern Montana had traveled or would travel in eastern Montana, and less than half of those interviewed in eastern Montana had traveled or would travel in northwestern Montana.

The general routes followed by tourist parties in Montana were also noted from the maps drawn by respondents. About one-quarter of the tourist population of the state had followed or would follow a single path of travel on U. S. 2, U. S. 10 and other east-west routes, or follow solely a north-south or inter-park route. The vast majority use these routes in some combination. Those using an inter-park routing only stay in the state one night more than the strictly east-west traveler, and those using U. S. 2 in combination with inter-park routing average almost a full night more than other travelers as a group. These using U. S. 2 in combination with inter-park travel put much less of a premium on speed as a reason for route selection than those using other east-west routes in combination with inter-park travel.

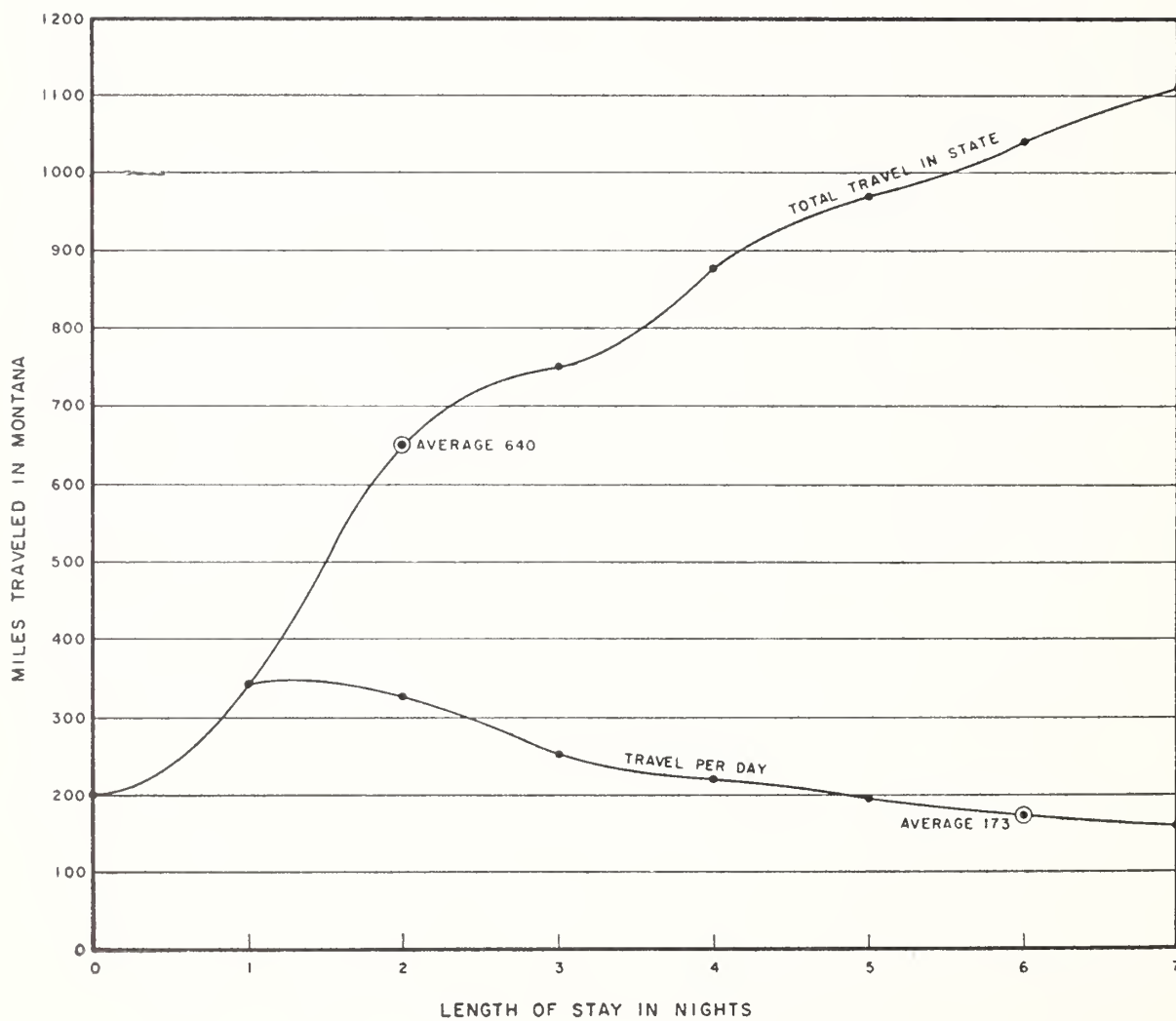
Fifty-five percent of those sampled at accommodations places indicated they had used state numbered highways. The percentage for Montanans and for campers was much higher, about 80 percent. Ninety percent of the Montanans who had used such routes and 72 percent of the out-of-staters who had used them felt they were of comparable quality to U. S. numbered routes. The majority of those who had not traveled on state numbered routes had no opinion about their probable comparative quality. It would not appear that the fact that a highway has a state number presents in the mind of the traveler any positive deterrent to using the route. He may well be in the habit of following only U. S. numbered highways, but he has no mental set against the state routes.

While 49 percent of the daily tourist population gave a trip destination in Montana, this percentage varied considerably according to routings within the state. Only about one-third of those traveling solely on an east-west or west-east routing gave a Montana destination, while 68 percent of those traveling north-south or inter-park routes exclusively claimed a destination in Montana. Those traveling a combination of U. S. Route 2 and north-south routes were much more likely to have a destination in Montana than those traveling a combination of other east-west and north-south routes.

The difference in the character of travel according to routes taken in the state is brought out by different responses to the question, "How many miles did you travel today?" The average for those traveling solely on U. S. 2 was 280 miles, while

FIGURE IV - 1

RELATIONSHIP BETWEEN MILES TRAVELED
IN MONTANA AND LENGTH OF STAY



for those traveling only U. S. 10 or other east-west routings the figure was 402 miles. For those traveling only on north-south or inter-park axis, the average miles traveled on the day of interview was 209. The distances per day for those using these routes in various combinations was about the same as the overall average, around 280 miles.

Mileage in Montana

Evidence on total highway use or miles traveled in Montana comes from several parts of the survey. Respondents in the accommodations sample were asked how many miles a day they "usually travel." This figure averaged 345 for all respondents. Various groups in the sample showed quite different averages. Out-of-staters (373) exceeded Montanans (175), non-campers (362) exceeded campers (251), and those without a Montana destination (394) exceeded those with Montana destinations (295). Generally speaking, the groups that might be expected to have a greater interest in Montana gave estimated travel per day figures lower than those simply passing through the state.

Answers to the question, "How many miles did you travel today?" averaged significantly less than the "usual travel" figures. Apparently tourists actually put on less mileage per day than they think they do, perhaps unconsciously seeking to reassure themselves that they are getting somewhere, or possibly more simply associating the word "travel" only with the days on which they were moving from one place to another. The average for all parties for miles traveled "today" was 280, with the same pattern of differences among various groups as mentioned above. The average miles traveled "today" drop consistently as the number of nights stayed in Montana increase.

The pattern of decreasing travel per day as the length of stay increases is brought out sharply in the total distances traveled in Montana as measured from the route maps supplied by respondents. The figures, shown in Table IV-8, suggest a leveling off of the measured distances after a period of five or six days in the state is reached. These measured total mileages in the state seem to level off at between 700 and 800 miles of travel. However, a comparison of the miles per day figures implied by the measured distances for various lengths of stay with the corresponding figures of average miles traveled today suggest strongly that the measured distances are under-estimated. The comparison suggests that for those staying two days and over, the measured distances may fail to include as much as 50 miles of travel per day in the state. This is not inconsistent with what occasional travel and side trips apart from the principal route of travel of the respondent into and out of the state could account for. This is the kind of travel the maps would, of course, fail to reflect. Table IV-9 shows the effect of adding this amount of "indirect" mileage to a smooth curve of mileage against length of stay derived from the measured map figures. The average distance per party in Montana implied by this "adjusted" curve is approximately 640 miles (Table IV-10). Since the average length of stay for all parties is 3.7 days, the average distance traveled per party-day is 173 miles approximately.

If the average total mileages for varying lengths of stay in Table IV-10 are converted to average mileages per day, and the average of these mileages per day obtained by weighting by the distribution of parties, the resulting average of the

miles per day figures for all parties is approximately 250 miles. This may not seem at first to be consistent with the much lower figure of 173 miles per day just obtained. The explanation is that the average of 250 miles is an average of the average miles per day figures for all parties. Each party's average miles per day is weighted equally whether the party stayed two days or ten. Since parties staying fewer days travel more miles per day than parties staying longer, this weighting produces the higher average figure. A proper average miles traveled per occupant day in Montana should weight each day of occupancy equally. The figure of 173 miles per day does carry this system of weights. It is still proper to say that the "average" tourist travels 250 miles per day, but the "average" day of tourist occupancy in the state entails but 173 miles of travel.

TABLE IV-1
Duration of Entire Trip and Nights Spent in Montana,
Parties Leaving Montana at Seventeen Roadside Check
Points, Summer 1958

Duration of Entire Trip	Nights Spent in Montana							Percent of Parties	Average Nights in Montana
	0	1	2	3	4-5	6-9	10 & over		
5 days and under.....	4.85	3.38	2.42	1.46	.87	---	---	12.98	1.26
6-10 days	1.77	4.51	3.53	2.04	2.95	2.16	.07	17.03	2.71
11-15 days	1.55	6.36	4.41	2.19	2.63	2.27	1.48	20.89	3.09
16-20 days .....	.91	5.24	4.07	1.97	1.60	1.51	1.61	16.91	3.42
21-25 days .....	.54	3.38	3.21	1.16	1.27	.69	.91	11.16	3.39
26-30 days .....	.20	2.01	1.71	.80	.61	.30	.55	6.18	3.66
Over 30 days.....	.61	3.86	3.75	1.48	1.44	1.14	2.57	14.85	8.40
Percent of Parties.....	10.43	28.74	23.10	11.10	11.37	8.07	7.19	100.00	3.70
Percent of Nights spent.....	---	8.03	12.88	9.18	13.77	15.93	40.21	100.00	---

TABLE IV-2
Duration of Entire Trip and Nights Spent in Montana,
Occupant Survey, Summer 1958

Number of Days or Nights	Total Trip Duration % respondents	Nights Spent in Montana	
		% parties	% party-days
1.....		40	17
2.....	5.6	32	28
3.....		12	16
4-5.....	5.3	12	22
6-9.....	12.5	3	10
10-19.....	39.2	1	7
20-29.....	19.0	....	....
30-39.....	11.7	....	....
40-49.....	2.7	....	....
50 and over.....	4.0	....	....
	<u>100.0</u>	<u>100</u>	<u>100</u>

TABLE IV-3
Distribution of Parties and of Party-Days by Directions
of Entry and Exit from State, Montana Tourist Survey,
Summer, 1958

Exit	Percentage of Parties Entering*				Percentage of Party-Days Entering**				
	West	South	East	North	West	South	East	North	Total
West	6.8	6.8	10.1	3.7	7.7	14.5	10.0	4.2	36.4
South	12.9	12.4	7.2	5.2	7.7	11.1	6.1	2.3	27.2
East	9.0	2.6	6.8	1.8	6.5	8.8	7.3	----	22.6
North	3.8	4.0	3.1	3.8	1.1	2.3	5.0	5.4	13.8
Total	32.5	25.8	27.2	14.5	23.0	36.7	28.4	11.9	100.0

*Percentage of respondents, roadside survey.

**Percentage of respondents, occupant survey.

TABLE IV-4
Direction of Exit of Parties Entering Montana at
Selected Check Points, Summer 1958

Check Point	Same Point	Proportion of Parties Entering		Who Exit		Total
		Same Border	Opposite Border	Other		
West						
Troy.....	21.8	29.0	29.1	41.9	100.0	
Saltese.....	11.4	14.5	28.5	57.0	100.0	
South						
West Yellowstone.....	41.6	54.4	8.5	37.1	100.0	
Gardiner.....	16.6	28.7	23.3	48.0	100.0	
East						
Wibaux.....	20.8	25.1	36.4	38.5	100.0	
Culbertson.....	12.7	20.3	45.9	33.8	100.0	
North						
Babb.....	13.3	16.4	35.4	48.2	100.0	
Sweetgrass.....	35.2	37.6	38.8	23.6	100.0	

TABLE IV-5
Characteristics of Montana Routing of Various Groups
in Occupancy Survey, Summer 1958

Tourist Group	Proportion Taking Direct Routing	Proportion Traveling in		Eastern Montana	Proportion Using State Numbered Routes	Proportion Selecting Route Partly for Speed
		Northwest Montana	Central Montana			
All Tourists	55.6	66.0	86.7	58.4	54.6	37.9
Montanans	70	57	98	51	82	51
Out-of-States	53	68	85	60	50	36
With Montana Destination.....	54	57	87	55	60	32
Without Montana Destination.....	57	80	93	66	50	43
Campers	39	78	94	43	80	22
Non-Campers	58	67	90	64	50	40

TABLE IV-6
Characteristics of Tourist Parties by Routes Taken in Montana,
Occupant Survey, Summer 1958

Route Combination Used	Percent Total Respondents	Average Nights in Montana	Percent Having Montana Destinations	Percent Selecting Route Partly for Speed
(1) Primarily U. S. 2.....	7.0	2.1	35	50
(2) Primarily Other East-West.....	11.6	1.9	30	55
(3) Primarily North-South Parks.....	6.7	2.9	68	40
(4) (1) and (3) Combined.....	10.8	3.5	62	11
(5) (2) and (3) Combined.....	27.8	2.6	40	50
(6) (1), (2), and (3) Combined.....	30.7	3.1	55	20
(7) All Other Routings.....	5.4	....	....	79
All Tourists	100.0	2.7	49.1	37.9

TABLE IV-7
Miles Traveled on Day of Interview, Occupant Survey

Miles Traveled "Today"	Percent of Respondents
Under 75.....	19.7
75 and under 150.....	8.1
150 and under 225.....	11.8
225 and under 300.....	8.9
300 and under 375.....	12.3
375 and under 450.....	16.3
450 and under 525.....	15.0
525 and under 600.....	4.2
600 and over.....	3.7
Total	100.0

TABLE IV-8
Average Mileage in Montana and Average Miles per Day
by Length of Stay in Montana as Determined from
Measured Map Mileages and Question on Miles Traveled on Day
of Interview, Occupant Survey

Length of Stay (nights)	Miles per Day		Mileage in Montana	
	Maps	Question	Maps	Question
1.....	449	313	449	313
2.....	313	349	626	698
3.....	237	271	711	813
4-5.....	151	298	660	1,299
6-9.....	102	197	696	1,343
10 and over.....	38	163	747	3,211

TABLE IV-9

**A Smoothed Curve of Total Mileage in Montana
by Duration of Stay Derived from Map Mileages Plus
Fifty Incremental Miles per Day for Those Staying Two Nights or More**

Length of stay Nights	"Smoothed" Map Mileage	Incremental Mileage	Total Mileage	Implied Mileage per Day
0.....	200	....	200	....
1.....	340	....	340	340
2.....	500	100	650	325
3.....	600	150	750	250
4.....	675	200	875	219
5.....	720	250	970	194
6.....	740	300	1,040	173
7.....	760	350	1,110	159
Over 7.....	800	400	1,200	77*

*Average stay for parties staying over 7 nights is 15.5 nights in Montana based on Roadside Survey.

TABLE IV-10

**Application of Curve of Average Miles in Montana by Length of Stay
to Distribution of Tourist Parties by Length of Stay to Obtain
Distribution of Total Montana Mileage by Length of Stay and
Average Miles in Montana per Party**

Length of Stay (nights)	Average Miles in Montana	Percentage of Parties*	Percentage of Total Mileage
0	200	10.2	3.2
1	340	28.5	15.1
2	650	22.8	23.2
3	750	10.8	12.7
4	875	6.9	9.4
5	970	4.3	6.5
6	1,040	2.4	3.9
7	1,110	3.3	5.7
Over 7	1,200	10.8	20.3
All Parties	640	100.0	100.0

*Outbound roadside survey.

V. TOURIST OBJECTIVES AND ACTIVITIES IN MONTANA

Tourists' Destinations in Montana

Information on destinations in Montana comes from both the sample of tourists at accommodations places and from the roadside interviews of motorists leaving the state. In interpreting the data it should be borne in mind that these two surveys are samples of different populations. More important even than the difference in coverage (those not staying in commercial accommodations or camping are not included in the occupant sample) is a difference in the sampling concepts employed. The occupant survey is a sample of tourist *occupancy* within the state, while the roadside survey is a sample of *tourists who visited* the state. The chance of inclusion of an out-of-state tourist party in the occupant sample is directly proportional to the number of nights spent in the types of establishments covered by that survey. Thus this sample includes a larger proportion of persons staying longer in the state than does the roadside sample. Every out-of-state tourist has the same chance of inclusion in the roadside sample, which will consequently include proportionately more short-time visitors than the accommodations sample. Each sample yields a useful picture, but of different things. The accommodations sample yields a picture of the average characteristics of tourists in the state on any given day, while the roadside sample yields a picture of the average visitor to Montana.

An appreciation of these differences is necessary to an understanding of the travel detail in Montana. To illustrate, 37.3 percent of the out-of-staters in the roadside survey gave a Montana destination, while 46 percent of out-of-staters in the accommodations sample mentioned a destination in Montana. But we know that those with a destination in Montana stay longer than those without a specific Montana destination, and we would expect to find in a sample of occupancy a larger proportion of such parties than in a sample of visitors. Both figures are useful. Thirty-seven percent of all visitors have a Montana destination, and 46 percent of all parties in the state at any given time have a Montana destination.

For the entire accommodations sample, 49 percent of state's tourist population have destinations in Montana. Well over one-half of these destinations are Glacier or Yellowstone Parks, and the remainder are highly scattered. For the Montanans in the sample the attraction of Glacier and Yellowstone is not so dominant, representing together less than one-third of the Montana destinations of Montanans. For non-Montanans in the state, the corresponding figure is two-thirds. While the National Parks are unquestionably our greatest asset for attracting tourists, there is a great need for promoting other areas in the state as supplementary attractions, or even as areas meriting the tourists' attention on their own. That this has not been successfully done is evident from the extremely thin and scattered responses for destinations such as the various national forests, the various scenic valleys of the state, and the wilderness, wild, and primitive areas.

While Yellowstone and Glacier Parks rank close together as measured by the destinations of those in the state at a given time, Yellowstone of course is an attraction for a much larger number of visitors to Montana. The explanation for this seeming paradox is that the average tourist with a destination in Glacier Park stays

in the state over five nights while the typical visitor with a Yellowstone destination remains in Montana but 2.5 nights on the average. The average mileage covered in Montana for those in the occupant sample whose trip destination was Glacier was 860 miles compared with 560 miles for those giving Yellowstone as the trip destination.

The predominance of Yellowstone Park in the number of tourists attracted to Montana, as opposed to the number of party days in Montana contributed by those attracted principally by Yellowstone, appears in the data on objectives and destinations in Montana from the outbound roadside interviews. As measured by stated objectives, Yellowstone outdraws Glacier about two to one (28 percent to 13.5 percent of Montana objectives), and the ratio is about the same when based on the question regarding destinations (23.2 percent to 11.0 percent of Montana destinations). That the merits of the two parks in attracting tourists cannot be entirely separated is pointed up by the fact that a little over 40 percent of the parties giving either one of the parks as the trip destination also visited the other park. This was determined from inspection of the Montana route maps drawn by the respondents. Were it not for the Glacier campers, few of whom also visited Yellowstone, the proportion of those giving Glacier as a destination who also visited Yellowstone would have been over one-half.

From the roadside survey data, about two-thirds of the Montana destinations of out-of-staters were places other than the National Parks, while this figure ran only about one-third from the accommodations sample. The most likely explanation for this is the presence in the roadside survey of those not using commercial establishments or camping . . . those staying with friends, relatives, in trailer houses, or sleeping in cars, plus a tendency for Glacier Park visitors to account for a larger proportion of tourist days in the state than of visitors to the state. Those staying with friends and relatives particularly, would have varying destinations across the state aside from the two parks.

The principal areas of destination (by counties) in the state aside from the National Parks were Yellowstone, Cascade, Gallatin, Flathead, and Missoula counties. Yellowstone county led this group with 8.5 percent of Montana destinations, and the remainder were closely bunched between 4 and 6 percent each. Additional counties with over two percent of Montana destinations each were Madison, Lincoln, and Silver Bow. These counties, when added to Glacier and Yellowstone Parks, account for over 70 percent of all stated destinations in Montana.

High Points of Trips in Montana

One question asked, "What places do you feel are the high points of your trip?" has a planning aspect to it if answered early in the respondent's particular trip; on the other hand, it has an evaluation quality if posed later. When the answers of all respondents are considered we find approximately one-fourth mentioned first specific places outside Montana. Furthermore, nearly one-fifth of the respondents gave answers which were not specific as to location in a particular state. Montana mentions were about equally divided between Yellowstone (21% of respondents) and Glacier (19.2%), with other Montana locations securing 16.1 percent mentions *in toto*.

Looking at these data solely for out-of-staters yields an interesting result. Of this out-of-state sample 44 percent mentioned Glacier or Yellowstone. This figure is 65 percent of those mentioning any specific locality in Montana. It seems clear that these two mentioned parks are well-known by our visitors and that each one alone creates a total impression equal to all the rest of Montana. The need to promote Montana in a more *general* sense is pointed up by these findings. There is more to our state than two outstanding attractions.

Tourist Traffic of Cities and Towns in Montana

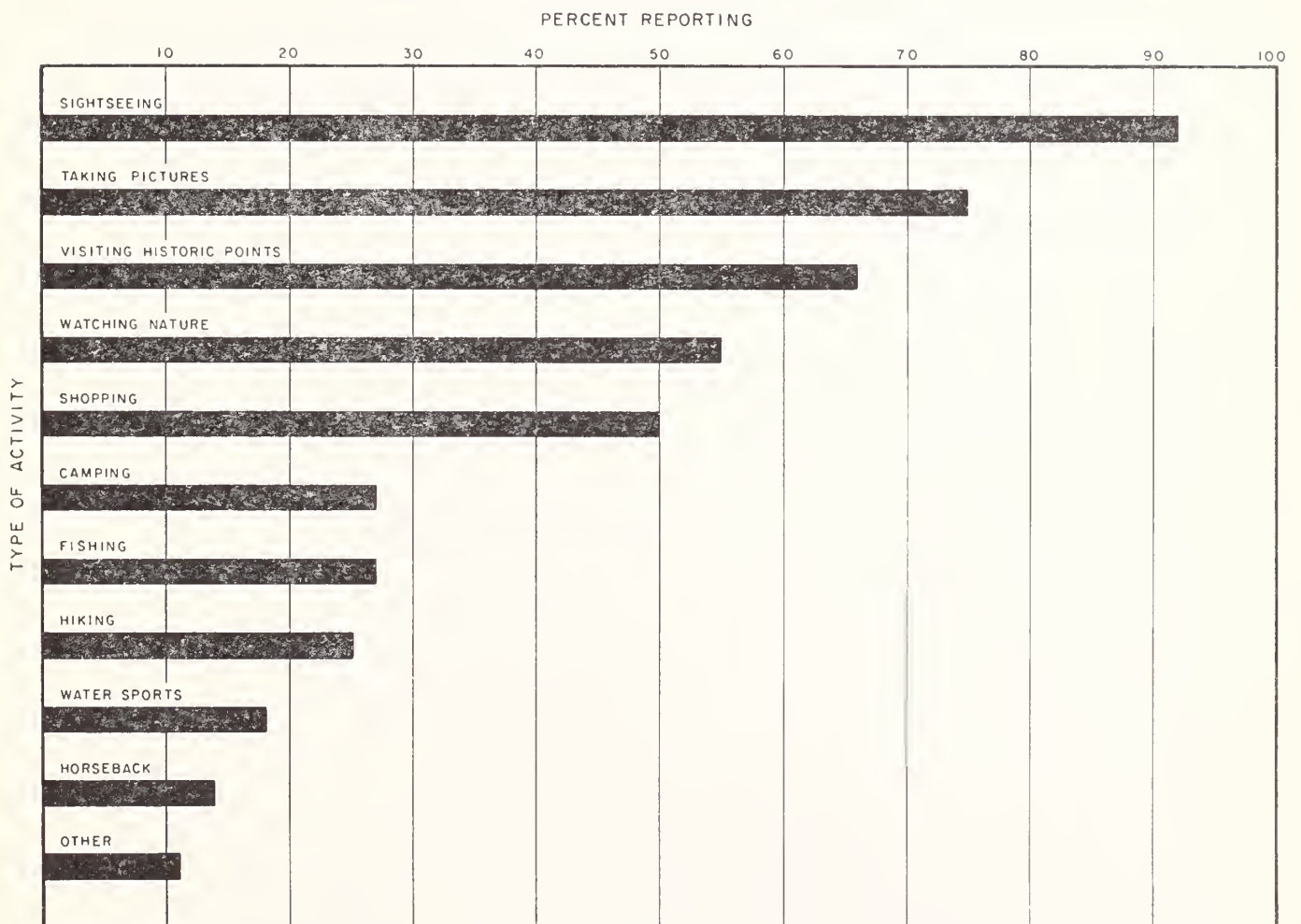
In order to estimate the traffic pattern in the state, some 73 points were established on the route maps drawn by the respondents in the occupant survey. Then the number of tourist parties whose route passed through each of these points was tabulated. Allowance was made in this tabulation for the different proportions of persons with stays of varying lengths that would be encountered in an occupancy sample. With this adjustment these traffic counts provide estimates of the proportion of visitors to the state that pass through each of the points at some time during their trip in the state.

East Glacier appears as the most heavily traveled point in the state, followed closely by Missoula, Kalispell-Whitefish, Billings, Livingston, Laurel, and Great Falls. Between thirty and forty percent of the visitors sampled passed through each of these points in the state. Cities and towns enjoying a traffic stream of between 20 and 30 percent of the state's visitors include Drummond, Thompson Falls, Three Forks, Garrison, Helena, Bozeman, Butte, Big Timber, and Townsend, Forsyth, Miles City, and Glendive on U. S. 10, and Malta, Glasgow, Havre, Shelby, and Wolf Point on U. S. 2. In the next rank, between ten and twenty percent, are a number of points of entry including Gardiner, Wibaux, Babb, West Yellowstone, Culbertson, Hardin, Cooke City, Troy, and Baker.

This traffic analysis pushes to the fore the realization that many places in addition to our major cities have at hand a substantial traffic volume presenting a challenging potential for tourist attractions and accommodations. Other evidence in the survey reveals that over-night stop-overs are highly concentrated in perhaps six to ten larger cities in the state, and that areas of major interest for most tourists are even more limited. But neither of these things need continue unchanged. Travel in the state is general and widespread even if interest is not. As access to Montana is enhanced through coming improvements in the interstate system, and as the continuing rise in the standard of living nationally yields more time and money for devotion to the pursuit of leisure, surely this already vast traffic flow will increase. But just as surely, access *through* Montana will be made easier, and the tourist is going to have to be diverted from his seeming goal of making a grand tour of the west in two weeks by covering upwards of 400 miles a day. The technological facts of transportation by themselves will exert a powerful force tending to shorten the stay of a large sector of Montana's tourist population from two nights, as presently, to just one. Unless equally powerful counter forces are set in operation, medium size towns (for Montana) will be hard pressed to hold their own, let alone to forge ahead in the competition for the tourist dollar. And even the larger cities, while not suffering absolutely, may find themselves diverting a diminishing share of an increasing traffic flow.

FIGURE V - 1

ACTIVITIES REPORTED
BY
OUT-OF-STATE TOURISTS



Tourist Activities in Montana

What the tourist does while vacationing in Montana certainly has important implications for the planners of future highways in the state, as well as for persons charged with the responsibility of stimulating greater tourist traffic within its boundaries. Furthermore, businessmen who are engaged in enterprises designed to serve tourist needs will find concrete information about tourist activities useful. Previously, decisions revolving around what the tourist does in Montana had to be based upon observation, common sense, and hunch. Our goal was to ascertain, if possible, a better picture of tourist activities in the state than was already available. To achieve this goal approximately one-sixth of the questionnaire (all of page 3) was devoted to an exploration of this point with the tourist.

This part of the study was directed to non-residents of Montana. A list of common tourist activities was placed on a card and respondents were asked which things the party had done or planned to do in Montana. *Sight-seeing*, as one might suspect, was the pursuit most engaged in by Montana visitors, as 92 percent of all respondents revealed an interest in the activity. The next three most important activities were really concomitants of sightseeing, or other ways of saying the same thing, depending upon individual interpretation of terms. *Taking pictures*, with a 74.6 percent score, came in second, indicating that our visitors not only want to see our sights but wish to have a record to take home with them. Obviously these pictures assist that most-valuable of all advertising methods, word-of-mouth advertising. *Visiting historic points* (66.1%) and *watching nature* (55.3%) were in third and fourth places respectively.

If we couple these four activities with the eleventh place winner, *attending rodeos and horseshows* with a 7.6 percent mention, a pattern of THE PASSIVE MONTANA TOURIST emerges. The bulk of our visitors are "lookers" rather than "doers." Even when one recognizes that sometimes a great quantity of human energy can be expended in taking pictures, sightseeing, visiting historic points, watching nature and rodeos, it is fair to say that the stereotyped idea of an active vacation in Montana is not fully warranted. Our state tourist promotional efforts should subtly suggest the ease of vacationing in Montana. New tourist businesses should bear this predominant bent toward passivity in mind with the obvious end result being a stress on comfort in accommodations and facilities.

But not all tourists in our state are interested in an absolutely easy time of it. The fifth most mentioned activity was, surprisingly, shopping, with 50 percent of all respondents indicating it. Whether shopping should be classified as an "active" activity depends upon one's own prejudices on the point. Nevertheless, little attention has been placed on this activity in promotional literature and it would seem that an opportunity is being neglected. Possibly more roadside businesses are in order for the summer months at least. It should be noted that Canadian visitors in Montana consistently include shopping on their list of activities.

Passing to the more active pastimes we find camping (27.2%), fishing (26.9%), and hiking and walking (25.1%) at about the same level of participation. Approximately one-fourth of our visitors engage in one or more of these more strenuous endeavors. Water sports with 18 percent and horseback riding with 13.5 percent, trailed by miscellaneous sports such as golf and tennis with 2.8 percent, complete

the list of activities. Certainly these persons who like active vacations comprise important segments of the Montana tourist business. Yet it is submitted that too much emphasis on these activities in promotional literature is undesirable for two reasons: (1) people with these interests are in the substantial minority, thus much of the effort is wasted; and more importantly (2) the "typical" visitor may well conclude that Montana has nothing to offer him. Furthermore, a feeling of inadequacy may be created in the reader's mind. He will have guilty feelings because he does not hike, fish, camp, swim, or ride horses. Surely he will not choose as his vacation locale a place where he will have to prove himself. How, then, should the "active" market be tapped? Instead of featuring these appeals in generally circulated media, selected magazines designed to reach the fisherman, camper, and other special groups should be part of the advertising mix used. More thought and study is needed in the area of tourist motivation.

Differences in activities for persons with destinations in Montana and those with destinations other than Montana (that is, people passing through the state) may be noted in Table V-5. A breakdown between the activities pursued by campers and non-campers is also included.

By and large, out-of-state visitors found the activities they were looking for in the state. When asked if there was any activity that they planned to do which was found to be generally unavailable, 93 percent answered in the negative (7% said "yes"). No significant shortcomings were elicited. The few "complaints" were scattered in nature and included poor fishing, lack of swimming opportunities, the absence of cowboys and cattle, etc.

At the same time, more than twice as many persons (17%) found activities available which they had not anticipated. Among campers this feeling was very strong, for 42 percent of them found something they had not expected. Once again the listing was varied. Primarily the scenery was reported better than anticipated with individual respondents enumerating their own particular discoveries. Interesting enough, many of the "unexpected" items on one respondent's list were in another's "unavailable" group, indicating either that "you can't please everyone," or that vastness of Montana hides many of its tourist treasures. The latter condition makes both disappointment and the pleasure of discovery possible. Highway building, and particularly highway marking, can make the unique more generally available. Advertising can stress the mood of the unexplored that is present in Montana. Thus, a shortcoming can be used to advantage until it is removed.

Tourists' Attitudes and Observations

The terminal question to the questionnaire administered to tourists was in the nature of a non-directed question. The objective in asking it was to ascertain general attitudes of Montana tourists with a minimum of prompting and interviewer bias being interjected into the interviewing situation. The following question was asked: "Tell me what you can about your vacation experience so far in Montana: How does Montana compare with other areas you have visited, is Montana what you expected it would be, what about Montana do you like most, what are its shortcomings, do you think you may return another year, would you recommend it to your friends and relatives?"

Interviewers were instructed to jot down any remarks made by the respondents. Some idea of the impression Montana makes upon a tourist can be gleaned from an analysis of these responses, even though it must be admitted that this form of questioning has serious limitations including the bias of the interviewer, his ability or inability to establish rapport with the respondent, as well as his talent for making notes unobtrusively. Another factor is the place in the state where the interview was conducted; in some cases the respondents had not actually seen a great deal of the state at the time of the interview, thus their replies are a reflection of limited experiences. An examination of the results nevertheless tells much about the "image" that Montana creates in the minds of its visitors. The following, based on 206 interviews among out-of-state commercial establishment occupants and 58 campers, including Montanans, are some of the more significant references.

Scenery. The typical out-of-state non-camper is most impressed by Montana's scenery. Over one-quarter (57) of all respondents in this group were moved to state in one fashion or another that natural beauty, the mountains, the lakes, or some other scenic attraction impressed them. Unfavorable references, only two in number, resulted from a fog condition in Glacier Park during their visit. These observations probably should be classified as comments on bad weather conditions rather than lack of scenery. Of course, there were many references (20) to the spaciousness, desolateness, great distances, etc. to be found in eastern Montana, usually balanced off by a comment on the scenic attraction of the western part of the state, if the party had already seen the entire state. Some five respondents found this spaciousness and isolation, a part of scenery in one sense of the word, one of Montana's great attractions.

Highways. In one fashion or another the highway system of the state received a great number of comments. On the general condition of Highway, 14 parties indicated that they were pleased, while eight groups were displeased, with the amount of construction work being done, delays caused thereby, and similar comments being mentioned. It should be noted that the most lavish praise for Montana highways came from Canadian visitors. Seven people complained that the highways in the state could be better marked, while three persons thought them to be well-marked, including one reference to the historical markers. Two tourists expressed a desire for more roadside tables.

People. Surely one of the powerful factors in the Montana tourist equation is to be found in her people. Twenty respondents indicated that Montanans were friendly, courteous, and helpful to state visitors, and no one indicated a contrary evaluation.

Eating and Sleeping Facilities. The attitude toward accommodations was five favorable to two unfavorable. In the case of eating establishments one person expressed a favorable attitude set off against three adverse comments.

Prices. Nine respondents found prices in Montana comparably lower than other regions. Most of these were Canadian visitors who came to the state for the purposes of shopping. Ten people felt, in varying degrees, that prices were on the high side. Four of this group singled out gasoline prices as their sore point.

Weather and Climate. Four persons liked the cool climate and nice weather, while a like number found the state to be hot and dry. Timing of the visit and location of the interview are crucial factors in the respondent's attitude in this area.

Other favorable attitudes. Good fishing was mentioned by eight people. Four liked the shopping opportunities; three, the lack of commercialization of the tourist attractions and areas, and two the silver dollar which so characterizes the Treasure State.

Other unfavorable attitude. The presence of cattle on the highway (3 references) disturbed some people, as did the lack of camping facilities (2), and silver dollars (2).

Statements of intent. The overall impression made by the state on responding tourists must have been good, for 45 of them indicated that they would recommend a trip to Montana to friends and relatives. Furthermore, 32 parties were planning a return trip.

Attitudes of Montana-tourists. Responses of the 16 Montana residents interviewed in this phase of the survey were too general in nature for satisfactory classification. In general, these persons indicated that the state is a great place in which to live. Specific comments were aimed at the particular vacation location they were enjoying on their vacation.

Camper Respondents

A total of 58 parties, including 16 Montana residents, were interviewed in campgrounds. These persons were using trailers or tents as their means of shelter. Their general responses followed the pattern of tourists using commercial accommodations except that their responses were oriented toward the problems of campers. In other words, there was a minimum of response on characteristics such as scenery, fishing, people, etc., and an emphasis on what is right and wrong with Montana campgrounds.

First of all, they feel that there should be more campgrounds in Montana, particularly in the eastern half. Second, the existing camps need better care especially in the area of general policing. Many campgrounds were described as filthy. Another area of possible improvement lies in the incorporation of broader services in the facilities offered campers in our campgrounds; things such as electric outlets, showers, water taps, and washing facilities are desired. Furthermore, campgrounds should be better publicized by means of highway markers and list of campgrounds made available to the public. All in all, this segment of the tourist universe likes what Montana has to offer but wishes better and more places from which to enjoy the state.

TABLE V-1
Destinations of Various Tourist Groups in
Occupancy Survey, Summer 1958

Tourist Group	Glacier	Percentage of Destinations			Total
		Yellowstone	Other Montana	Outside Montana	
All Tourists.....	12.7	16.1	20.3	50.9	100.0
Montanans.....	10	12	57	21	100
Out-of-Staters.....	13	17	16	54	100
Campers.....	26	12	26	36	100
Non-Campers.....	10	17	19	54	100

TABLE V-2
Farthest Points of Travel from Home and Objectives
of Trips in Montana, Parties Leaving Montana
at Seventeen Roadside Check Points, Summer 1958

Farthest Point or Objectives in:	Objective of Entire Trip Percent Respondents	Farthest Point of Travel Percent Respondents
Yellowstone Park	28.0	23.2
Glacier Park	13.5	11.0
Yellowstone County	7.6	8.5
Cascade County	5.1	5.6
Gallatin County	4.8	5.8
Flathead County	4.8	5.2
Missoula County	3.6	4.1
Madison County	2.3	2.8
Lincoln County	2.2	2.5
Silver Bow County.....	2.2	2.9
Total Above Areas.....	74.1	71.6
Other Montana Counties.....	25.9	28.4
Total Montana	100.0	100.0

TABLE V-3
"High Points" of Trips in Relation to Montana for Various
Tourist Groups in Occupant Survey

Tourist Group	Glacier	Yellow- stone	Percentage of Respondents			Total
			Other Montana Locations	Not Indi- cating Place	Location Outside Montana	
All Tourists.....	19.2	21.0	16.1	19.0	24.7	100.0
Montanans.....	17	3	28	42	10	100
Out-of-Staters.....	20	24	14	22	20	100
Campers.....	29	5	12	47	7	100
Non-Campers.....	19	21	16	25	19	100
With Montana destination.....	23	26	22	22	7	100
Without Montana destination...	15	16	11	28	30	100

TABLE V-4
Estimated Proportion of Tourist Parties in Montana
Who Pass Through Various Places, Occupancy
Survey, Summer 1958

Place	% Total Parties	Place	% Total Parties
East Glacier	40.7	Butte	21.4
Missoula	39.7	Big Timber	20.4
Kalispell	38.5	Townsend	20.1
Billings	34.6	Custer	18.8
Livingston	32.3	Culbertson	17.1
Laurel	31.2	Gardiner	16.9
Great Falls	30.8	Ravalli	16.7
Drummond	27.5	Choteau	16.6
Miles City	25.4	Wibaux	16.5
Malta	25.3	Babb	15.8
Glasgow	25.3	West Yellowstone	15.4
Havre	24.5	White Sulphur Springs.....	14.7
Thompson Falls	24.2	Culbertson	14.6
Shelby	24.2	Lewistown	13.5
Forsyth	24.0	Libby	12.6
Three Forks	23.5	Hardin	12.6
Garrison	23.2	Roundup	11.9
Wolf Point	22.3	Cooke City	11.7
Helena	22.2	Circle	11.0
Bozeman	22.1	Troy	10.6
Glendive	22.1	Baker	10.0

TABLE V-5

Percentage of Out-of-State Tourist Parties Engaging in Various Activities
in Montana, Occupant Survey

Activity	All Out-of- State Respondents	Those Staying in Montana			Those Not Having a Montana Destination	Those Not Having a Montana Destination	Non- Campers
		1-3 nights	4-9 nights	10 or more nights			
Sightseeing	92.0	95	92	84	95	90	91
Taking Pictures	74.6	73	80	66	79	71	73
Visting Historic Points.....	66.1	58	78	60	74	59	64
Watching Nature	55.3	55	55	56	62	49	52
Shopping	50.0	31	50	48	54	30	43
Attending Rodeos, etc.....	7.6	3	8	20	7	8	8
Hiking-Walking	25.1	14	33	38	35	17	20
Fishing	26.9	12	36	46	40	16	25
Camping	27.2	20	25	52	34	21	18
Horseback Riding	13.5	5	20	22	21	7	13
Water Sports	18.0	10	23	28	28	10	15
Other Sports	2.8	....	7	....	5	1	13

VI. MONTANA'S TOURIST LODGING BUSINESS

Seasonality

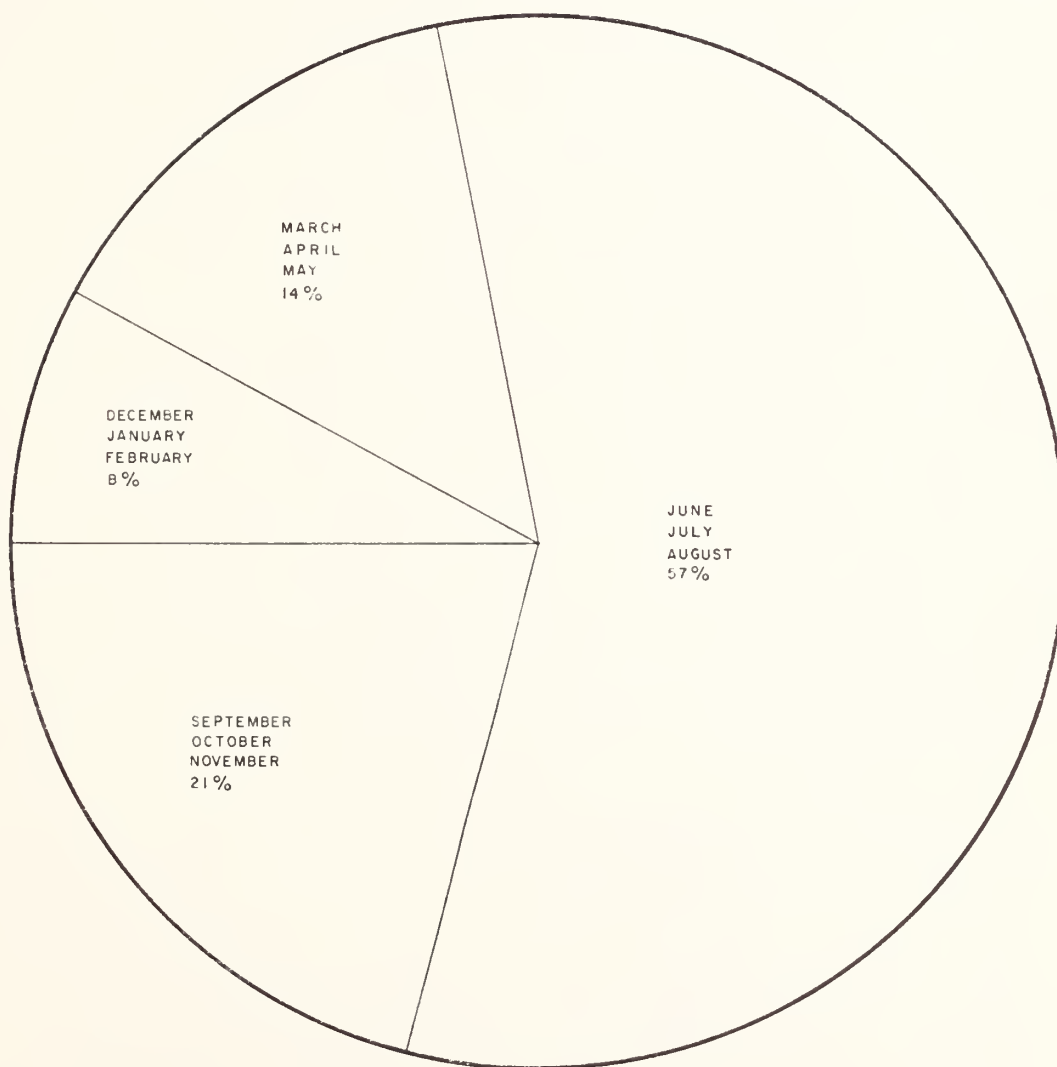
Everyone knows of the intense seasonality of Montana's tourist business. The shortness of the summer season is the bane of the establishment operator's existence. Investments, nearly as costly for summer operation as year-round, must be recouped in a period all too short to begin with. Should unseasonable weather prolong the effective opening of the season or hasten its close, or should highway construction, detours, or other impediments adversely affect occupancy for only a week or two, many operators are in substantial trouble.

A preliminary idea of the seasonality of tourism in Montana can be gained from counts by months of entering out-of-state traffic. June, July, and August account for 57 percent of year-round total traffic, and if September is added, the figure rises to 67 percent. However, we know that business travel accounts for some of the out-of-state entering totals, and that this travel in larger proportions in the fall, winter, and spring figures tends to restrict the apparent seasonality of tourist traffic as judged from the gross out-of-state counts. Inbound roadside interviews conducted in June yielded 16 percent business travelers and in September 27 percent business as compared to 10 and 11 percent during July and August. If one adjusts the monthly out-of-state entering counts by these figures, and assumes that during the remaining months of the year entering traffic is composed 50 percent of business travelers, the effect would be to raise the percent of total yearly tourist arrivals for June, July, and August to 67 percent, and these three months plus September to 78 percent. These figures on seasonality are rather close to the figures obtained by questioning operators about the proportion of their yearly tourist business done in the three month period from June 15 to September 15. These results, weighted by the number of units in each establishment, averaged 73 percent. On balance, it seems reasonable to conclude that about three-quarters of the total yearly tourist business in the state is concentrated in a period of 90 to 100 days in the summer.

Contribution of Tourism to Commercial Establishment Occupancy

The importance of tourist traffic to tourist establishment occupancy was estimated from replies of operators concerning the composition of their summer season and off-season business. Questions were devised so that the contribution of out-of-state and local tourists to summer season and off-season business could be derived. Summer season out-of-state tourists appear to account for about one-quarter of yearly tourist establishment occupancy in the state, and with off-season business added, out-of-state tourists provide one-third of year-round commercial tourist establishment occupancy. The contribution of local tourists is not quite so seasonal, with the off-season contribution from this source amounting to almost a third of the yearly contribution of just under nine percent of total year-round occupancy. Altogether tourism provides a little over 40 percent of the yearly business of commercial overnight tourist accommodations places in the state. A few smaller hotels in Montanan's major cities and trailer courts generally do not hold themselves out as catering to tourists, and are not considered as part of the base of this 40 percent. Of the 239 established operators sampled, 198 derive or hope to derive some portion of their income from tourism.

FIGURE VI - I
SEASONALITY OF TRAVEL
BY
OUT-OF-STATE PASSENGER CARS



Tourist Occupancy in Montana by Length of Stay and Type of Accommodation

While it is interesting to speak of the proportion of all tourists who stay varying number of nights in the state, it is equally important to realize the contribution of those with stays of varying duration to total tourist occupancy in the state. The detailed data on lengths of stay were presented in Chapter IV, but deserve re-emphasis here. While those staying three nights or less (from the outgoing roadside interviews) constitute 74 percent of all parties, they constitute only 30 percent of total occupancy in the state. The latter figure gives added focus, indicating that short-time visitors comprise only 30 percent of the market for occupancy in the state. To the extent that expenditures in the state are proportional to time spent, 30 percent would be the better measure of their contribution to the tourist industry in Montana. By contrast, the group staying longer than a week comprise less than 10 percent of all visitors, but account for 45 percent of total occupancy in the state. Given the very limited average length of stay for all visitors, it does not follow that the most effective means for enhancing the total tourist business of Montana lies in attracting more short time visitors or even in increasing the length of stay of the short-time visitor. Each additional party sold on a ten day stay is obviously worth roughly ten parties sold on an additional day. The real test lies in the cost and effectiveness of promotion directed toward the different groups. By the very nature of things, there are fewer potential ten-day stayers to reach, but the messages directed to them must be more accurately placed.

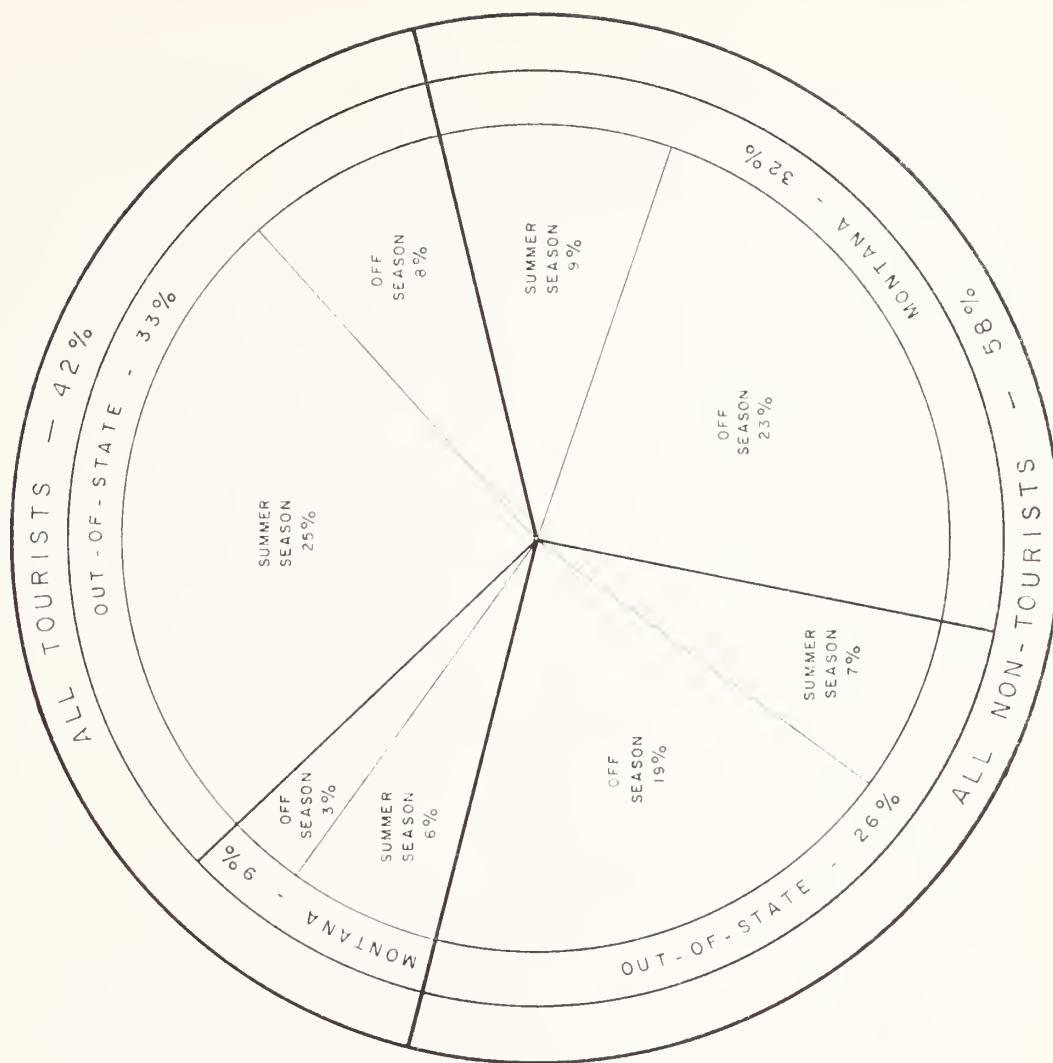
In a similar vein, we can examine the outgoing roadside survey data by kinds of accommodations used. Major interest here is on the commercial segment of tourist occupancy (motels, hotels, and tourist rooms) as contrasted with non-commercial occupancy. About 63 percent of all visitors use motels, hotels, or tourist rooms, but these commercial accommodations account for but 52 percent of total occupancy in the state. Almost half of the total nights spent in the state by tourists are spent in non-commercial accommodations. These include chiefly camping (15%) and relatives and friends (25%). While users of non-commercial accommodations comprise about 38 percent of all tourists, their average stay in the state is 4.8 days in contrast to 3.0 days for those staying in commercial establishments. Thus, the tourist occupancy which comprises two-thirds of the summertime commercial tourist establishment business in the state in turn represents only a little over one-half of total summertime tourist occupancy in Montana.

Commercial Tourist Occupancy by Establishment Size and Location

The achievement of a balanced sampling of establishments by location within the state permits the use of the operator interview data in estimating the geographic distribution of tourist business within Montana. Since the establishments within each geographic division were randomly selected by groups of three without regard to size of establishment, the data can also be used to estimate the division of establishment capacity and tourist business by size of establishment.

Forty-five percent of the total capacity of tourist establishments in Montana is found in central Montana, 28 percent in northwestern Montana, and 27 percent in eastern Montana. Sixty-three percent of this capacity is found in establishments in locations having fifteen or more tourist establishments, which will be referred

FIGURE VI - 2
 OCCUPANCY OF COMMERCIAL LODGING PLACES
 BY
 CLASSIFICATION, RESIDENCE AND SEASON



MONTANA	41%
OUT-OF-STATE	59%
TOTAL OCCUPANCY	100%

SUMMER SEASON	47%
OFF SEASON	53%
TOTAL OCCUPANCY	100%

TOURISTS	42%
NON-TOURISTS	58%
TOTAL OCCUPANCY	100%

to hereafter as "principal places." There are six such principal places in northwestern Montana, ten in central Montana, and four in eastern Montana. Tourist establishments in these principal places average 19.5 units, and in all other places in the state 10.3 units. The average for the entire state is 14.7 units.

Small establishments (8 or fewer units) have 15 percent of the occupant capacity in the state, medium size establishments (9 to 15 units) 27 percent of total capacity, and large establishments (over 15 units) have 58 percent of the total number of occupant units. The proportions of units occupied by tourists differs, however, by size of establishment. Fifty-four percent of the units in medium size establishments are occupied by tourists, while the proportions are 42 and 32 percent for small and large size establishments respectively. As a consequence, the importance of the medium size establishment to the tourist business is pointed up. They account for 37 percent of actual tourist occupancy as against 27 percent of total capacity. Establishments with more than 15 units account for 46 percent and small establishments 17 percent of total tourist occupancy. The division of actual tourist occupancy by areas of the state and principal versus other places follows fairly closely the distributions of establishment capacity. Central Montana may run a slightly higher rate of tourist occupancy to total units in its establishments than do the other areas of the state.

The data strongly suggest that, in northwestern Montana, commercial tourist establishments tend to a smaller size than elsewhere in the state. Nearly half of the establishments encountered in northwestern Montana had 8 occupant units or less, while this figure is nearer one-third for the remainder of the state. The average size for all sample establishments in northwestern Montana was 12.2 units, as compared with 14.9 and 18.1 for central and eastern Montana.

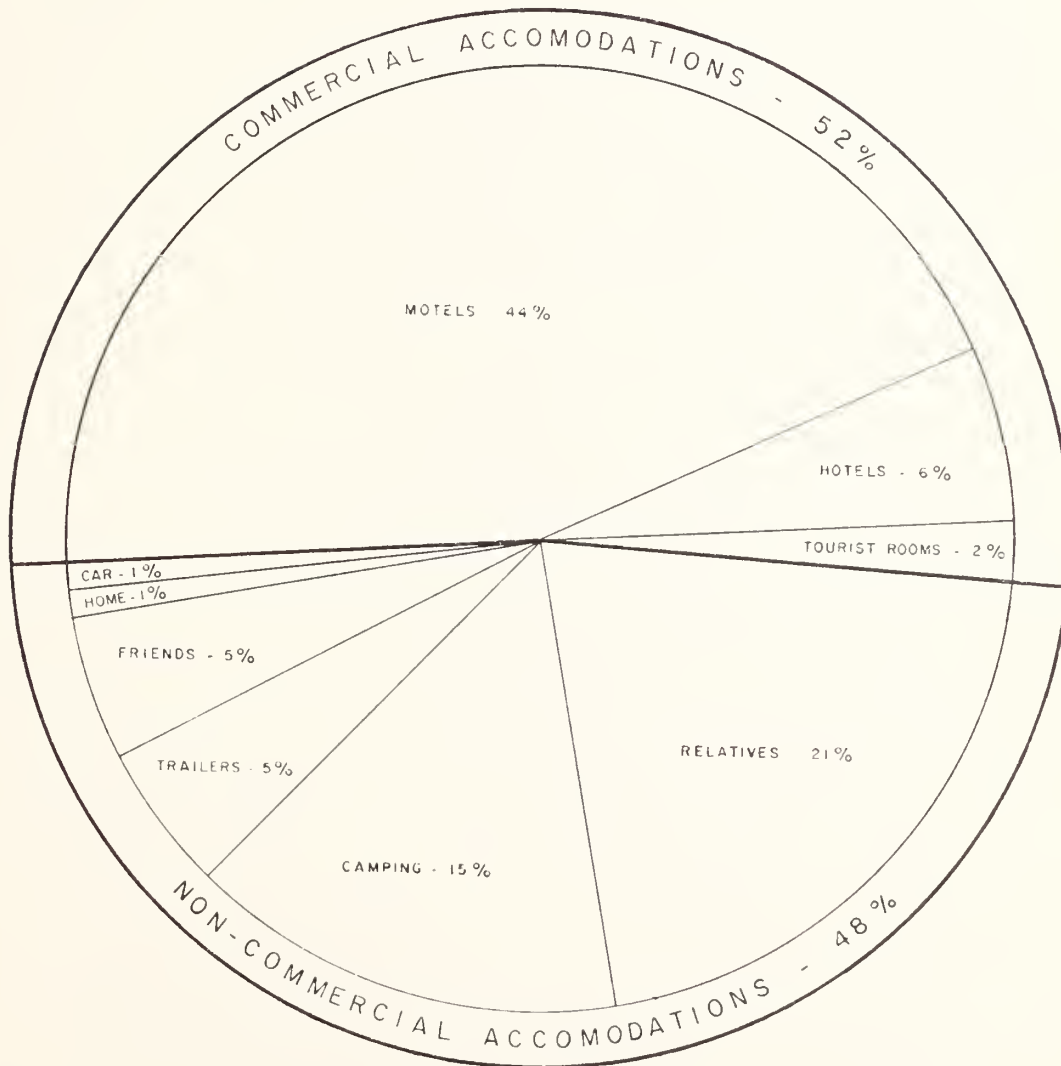
Commercial Tourist Occupancy by Route Location of Establishments

The number of commercial establishments, their total capacity, and their tourist occupancy were also tabulated by major route systems in the state. For the purposes of this analysis, establishments located in cities or towns at the approximate intersection of routes belonging to two or more different route systems were tabulated in each of the route systems and the final results, which would then include some overlap, were reduced to percentage terms by dividing by totals which included the overlap. This procedure in effect assumes that in establishments located on more than one route system patronage arises equally from parties traveling on the several route systems. While this may be far from the true state of affairs in individual instances, there is probably a considerable balancing out of errors in the totals by route systems. The number of establishments involved in this arbitrary allocation comprise about 25 percent of the total in the state.

About 46 percent of all tourist establishments in Montana and 54 percent of their accommodations capacity are found along major east-west routes. These establishments enjoy about 51 percent of the total summertime commercial tourist business in the state. North-south routes with the exception of those in the very eastern part of the state which are only very remotely related to access to or between the two national parks, account for 32 percent of all establishments, 31 percent of total occupant capacity, and 36 percent of all summertime commercial tourist business. The ratio of tourist business to total capacity in these establishments

FIGURE VI - 3

TYPES OF ACCOMODATIONS
USED BY TOURISTS



is somewhat larger (45%) than the corresponding ratio on other route systems. For all route systems or all establishments combined, this ratio is 39 percent. This greater emphasis on tourism along the inter-park routes is especially evident in establishments on these routes outside of the principal places. Generally speaking, establishment sizes run smaller along U. S. 2 and the inter-park routes than on other east-west routes.

Prices Charged for Lodging

The best indication of price levels for tourist occupancy in Montana is provided by the information given by operators on the prices usually charged for double units without meals. The range for all establishments encountered was from just under \$2.00 to over \$15.00, with an average per establishment of \$8.35. Frequently encountered price levels range from \$5.00 to \$12.00. Price levels appear to be somewhat higher in central Montana and lowest in eastern Montana. More substantial differences in prices charged occur by size and location of establishments, however. The average for establishments in principal places was \$9.13, with two distinct clusterings of prices at the \$8.50 and \$11.50 levels. This compares with establishments in other places averaging \$7.54 with the most customary rates charged at \$5.50 and \$8.50. Establishments having 8 or fewer units were found to be charging prices averaging \$7.22, considerably lower than medium and large establishments averaging \$9.03 and \$9.09. Perhaps the most typical price paid by tourists, in view of the distribution of actual tourist occupancy by establishment type, is \$8.50 in a medium size establishment in a principal establishment location.

Attitudes and Observations of Establishment Operators

When the operators of motels and hotels were asked, by means of the Supplementary Occupancy Survey questionnaire, for general comments about this year's (1958) tourist business, and about the problems facing the tourist business in Montana, the most usual response was in terms of the year's business volume contrasted with that of previous years. Forty respondents replied in this fashion. More than one-half stated that business was slower, or down, from previous years. Occasionally estimates, expressed as percentages, were offered; the average was twenty percent and the highest was 66 2/3 percent. Two respondents indicated that business was poor. Ten persons felt business was about the same for them; usually this response was accompanied by a remark that the particular establishment always fills to capacity during the tourist season. A few remarked that it took more time to fill up, however, than in previous years. Only three businesses stated categorically that business was better, or up.

Generally speaking, those who mentioned particular problems felt, way and beyond all other causes, that camping, trailers, and sleeping in cars was the bane of the motel operator's existence. Fourteen operators tabbed this factor as the most important problem; some of them expressed their feelings with hot words. High prices, for motels, foods, and gasoline, was next in line with six mentions. Lack of promotion of the state as a tourist attraction drew three mentions, while failure to let tourists know about points of interest in the state garnered two. Single mentions were for; poor cafe food, price-cutting in motel field, and failure to keep highway No. 89 open year-round.

TABLE VI-1
Percentage of Entering Out-of-State Passenger Vehicle
Traffic by Months as Estimated by
Planning Survey, Montana State
Highway Department

Month	Percentage of Yearly Traffic
January	2.3
February	2.4
March	3.5
April	4.6
May	6.2
June	17.0
July	20.7
August	19.3
September	9.8
October	6.8
November	4.2
December	3.2
Total	100.0

TABLE VI-2
Ratios to Average Daily Seasonal Traffic for
Specific Periods, Glacier and Yellowstone Parks

Period	Glacier Park* Ratio	Period	Yellowstone Park** Ratio
6/15 - 6/21.....	.63	6/11 - 6/20.....	.68
6/22 - 6/28.....	.76		
6/29 - 7/ 5.....	1.25	6/21 - 7/10.....	1.12
7/ 6 - 7/12.....	1.15		
7/13 - 7/19.....	1.20	7/11 - 7/20.....	1.16
7/20 - 7/26.....	1.12		
7/27 - 8/ 2.....	1.00	7/21 - 8/10.....	1.13
8/ 3 - 8/ 9.....	1.16		
8/10 - 8/16.....	1.19	8/11 - 8/20.....	1.23
8/17 - 8/23.....	1.16		
8/24 - 8/30.....	.86		
8/31 - 9/ 6.....	.53	8/21 - 9/12.....	.75

*Based on vehicular counts at West Entrance and St. Mary Entrance, 1958, provided by Superintendent's Office, Glacier National Park.

**Based on Daily Travel Reports, Yellowstone National Park, 1958.

TABLE VI-3
Percentage Distribution of Commercial Tourist Establishment
Occupancy by Season and Source Based on Estimates
of Operators of 198 Establishments

Source of Occupancy	Summer Season	Off Season	Yearly Total
Montana Tourists	6.0	2.8	8.8
Out-of-State Tourists	24.8	8.4	33.2
Total Tourists	30.8	11.2	42.0
Non-Tourists	15.9	42.1	58.0
Total Occupancy	46.7	53.3	100.0

TABLE VI-4
Average Nights Spent in Montana for Parties Leaving State
at Seventeen Check Points Classified by Type of Occupancy
Previous Night, and Implied Distribution of Occupant-Nights
by Type of Occupancy, Summer 1958

Type of Occupancy	Percentage of Parties	Average Nights Spent	Percentage of Occupant-Nights
Commercial			
Motel	56.3	2.9	44.0
Hotel	5.7	3.9	6.0
Tourist Rooms	0.8	7.9	1.7
Total	62.8	3.0	51.7
Non-Commercial			
Camping	12.5	4.5	15.2
Friends	3.2	5.4	4.6
Relatives	9.6	8.0	20.6
Home	8.1	0.6	1.3
Trailer	1.7	11.8	5.5
Car	2.1	1.9	1.1
Total	37.2	4.8	48.3
All Occupancy	100.0	3.7	100.0

TABLE VI-5
Percentage Distributions of Commercial Tourist Establishments, Occupant Units, and
Tourist Occupancy by Area of State and Type of Locality

Area	Establishments		Occupant Units		Tourist Occupancy	
	Principal Places*	Other	Principal Places*	Other	Principal Places*	Other
Northwest Montana	15	19	34	16	12	28
Central Montana	24	21	45	33	12	45
Eastern Montana	8	13	21	14	13	27
Total	47	53	100	63	37	100

*Principal Places are those locations having 15 or more establishments in the original listing of 1,127 establishments. These places are:
 Northwest Montana: Bigfork, Hot Springs, Kalispell, Missoula, Polson, West Glacier
 Central Montana: Bozenan, Butte, Cooke City, East Glacier, Gardiner, Great Falls, Havre, Helena, Livingston, West Yellowstone
 Eastern Montana: Billings, Glasgow, Glendive, Miles City

TABLE VI-7
Percentage Distributions of Commercial Tourist Establishments, Occupant Units,
and Tourist Occupancy by Size of Establishment for
Principal and Other Tourist Localities

Size of Establishment (Occupant Units)	Percent Establishments		Percent Occupant Units		Percent Tourist Occupancy	
	Principal Places	Other Places	Principal Places	Other Places	Principal Places	Other Places
8 and Under	27	53	40	8	15	9
9-15 Units	34	34	34	20	27	30
16 and Over	39	13	26	72	58	61
All Establishments	100	100	100	100	100	100

TABLE VI-6

**Occupant Units per Establishment and Tourist Parties per Occupant Unit
by Area of State, by Type of Locality, and by Size of
Establishment, Commercial Tourist Establishments
in Montana**

Class of Establishment	Occupant Units per Establishment	Tourist Parties per Occupant Unit (%)
Northwest Montana.....	12.2	38.1
Central Montana.....	14.9	42.3
Eastern Montana.....	18.1	35.6
Principal Places.....	19.5	38.5
Other Places.....	10.3	40.6
8 units and under.....	5.6	42.2
9-15 units.....	11.6	53.9
16 units and over.....	33.1	31.7
All establishments.....	14.7	39.3

TABLE VI-8
Characteristics of Commercial Tourist Establishments and
Their Tourist Occupancy by Major Routes in Montana

Characteristic	East-West Hi-Line	East-West Other	North-South Parks	North-South Other	No Major Route	Total
Percent of Establishments.....	16.5	29.6	31.8	8.1	14.0	100.0
Percent Occupant Units.....	16.0	37.8	30.9	10.8	4.5	100.0
Percent Tourist Occupancy.....	13.8	37.3	35.7	9.4	3.8	100.0
Occupant Units per Establishment.....	14.3	18.8	14.3	19.6	4.7	14.7
Tourist Parties per Occupant Unit (%)....	33.7	38.7	45.4	34.1	32.9	39.2

TABLE VI-9
Distribution of Prices Charged for Double Units for Each Area
of State, Type of Locality, and Size Class of Establishment,
Commercial Tourist Establishments in Montana

Price Range	All Establish- ments	Area of Montana			Type of Locality			Size of Establishment		
		North- west	Central	East- ern	Princi- pal	Oth- er	Small	Medi- um	Large	
\$ 1.75 - 3.24.....	1.7	....	1	6	1	2	1	2	2	
3.25 - 4.74.....	4.6	9	3	3	6	3	7	....	7	
4.75 - 6.24.....	18.3	18	12	32	6	29	30	12	8	
6.25 - 7.74.....	17.1	18	17	16	16	18	25	12	10	
7.75 - 9.24.....	29.1	32	27	30	28	30	23	36	29	
9.25 - 10.74.....	10.3	5	15	8	10	11	7	13	12	
10.75 - 12.24.....	12.0	10	16	5	20	5	4	17	20	
12.25 - 13.74.....	2.3	5	1	....	5	....	....	3	5	
13.75 - 15.24.....	4.6	3	8	....	8	2	3	5	7	
Total	100.0	100	100	100	100	100	100	100	100	
Mean Price	\$8.28	\$8.16	\$8.89	\$7.12	\$9.13	\$7.54	\$7.22	\$9.03	\$9.09	

VII. TOURIST EXPENDITURES IN MONTANA

Expenditures per Party Day

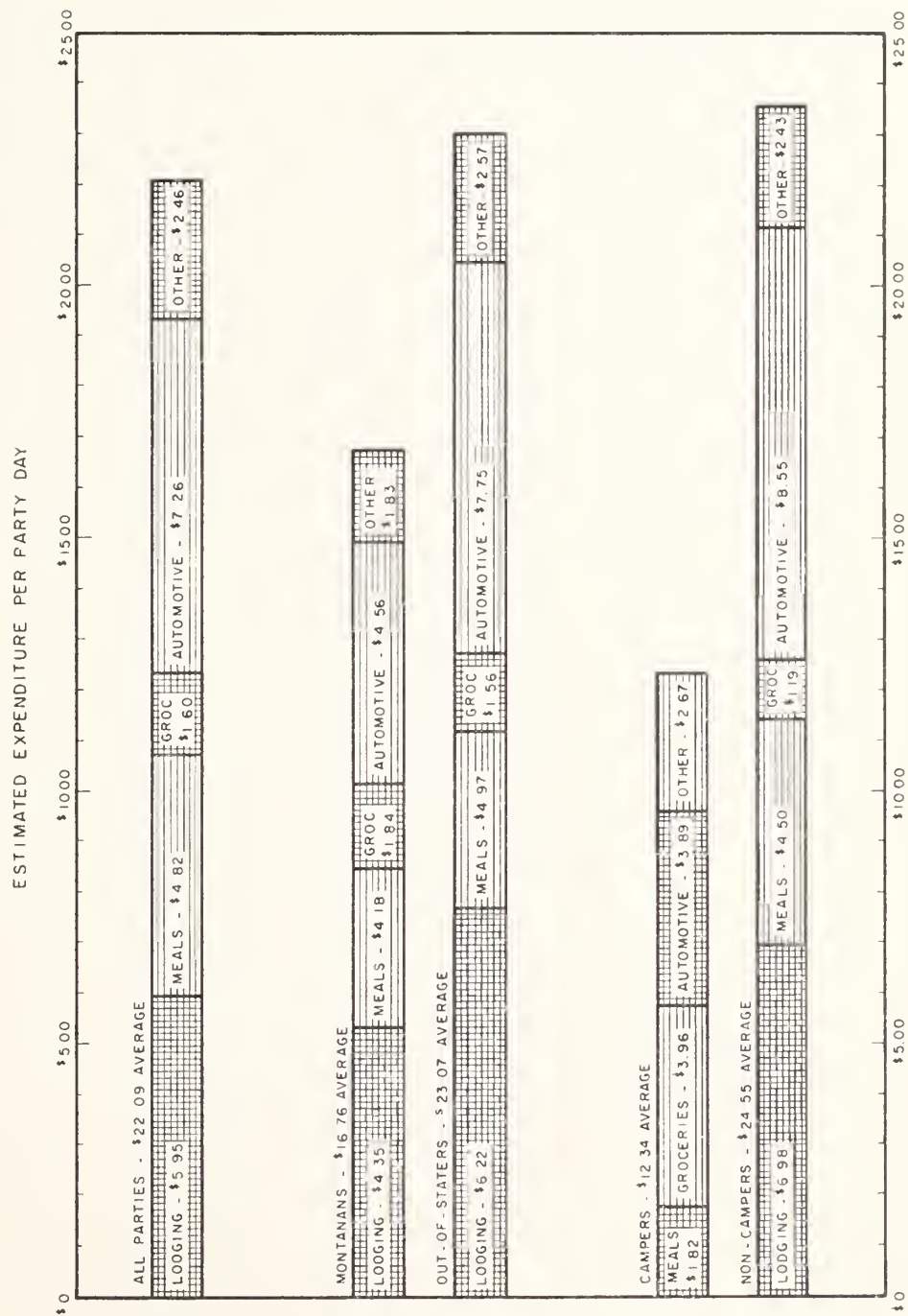
Attempts were made in both the tourist interviews in commercial establishments and campgrounds and in the roadside interviews to collect information on expenditures of the touring party. Results from the two sources are included in the accompanying tables. The object of including expenditure information was to permit a determination of an expenditure figure per party-day in Montana, which could then be applied to an estimate of total party-days spent by tourists in Montana to arrive at a dollar volume figure for tourism in Montana. Before attempting such an estimate, it is well to examine the expenditure data in detail.

The level of expenditures obtained from three related questions on the establishment occupant questionnaire is quite consistent. Respondents were asked how much they budgeted for the entire trip, and the planned duration of the trip. The mean budget figure was \$411 and the mean duration for trip 18.6 days, resulting in implicit expenditures of \$22.10 per party-day. At another juncture in the questionnaire, the tourist was asked what he estimated it cost his party per day on a trip such as this. The average figure obtained employing this approach was \$22.93 per party-day. At yet another stage of the questionnaire, respondents were quizzed about their actual expenditures for the previous day, with the tourist asked specifically about gasoline and automotive, lodging, meals, food purchased for off premise consumption, and other expenditures. The average expenditure per party-day derived from a totalling of these specific expenditures was \$22.87. Generally speaking, these figures confirm about the same level of expenditures.

However, the several figures could all suffer from the same tendency to underplan, underestimate, or under-recall actual expenditures. That there may be some tendency in this direction is suggested by the proportion of parties reporting spending in each category of expense. The percentage of parties failing to report gasoline and automotive expenditures is not unreasonable in view of the fact that one's tank need not be filled each day. If money spent rather than the value of gasoline consumed was accurately reported, the expenditures averaged over all respondents would be the proper average, since it would include also persons who spent for gasoline on the particular day more than they actually used up. In view of the substantial proportion of respondents reporting grocery purchases, the proportion reporting expenditures on meals does not appear unrealistically low. Considering the substantial importance of non-commercial tourist days in Montana already described, the proportion reporting expenditures on lodgings could well be accurate. Remember that, excepting campers, these results reflect the previous night's lodging of tourists found on the day of interviewing in commercial establishments. Among all expenses, the lodging item seems the one least likely to fail to be recalled, and there seems no obvious reason for the respondent either deliberately or unconsciously to mislead the interviewer. On the contrary, interviewers felt that tourists generally were surprisingly cooperative on all of the expense items, many going to the trouble of checking actual notebooks or other records. Notwithstanding this, the reporting of "other expenditures" is somewhat questionable, including as it does a variety of possibilities for forgetting despite the best intentions of even the most cooperative respondents.

FIGURE VII - I

ESTIMATED EXPENDITURES PER PARTY DAY
AS REPORTED BY TOURISTS
(UNADJUSTED)



NOTE: FIGURES SHOWN ARE UNADJUSTED AVERAGES REPORTED BY TOURISTS. AMOUNTS SHOWN SHOULD BE INCREASED BY ABOUT 25% TO COMPENSATE FOR UNDER ESTIMATED AND OVERLOOKED ITEMS.

In any event, the range of possible bias owing to under-reporting by categories can be pinned down. Totaling the expenditures averaged over only those reporting expenditures in each category yields a figure of \$33.35. Because this figure contains an obvious overlap in food expenses for on-premise and off-premise consumption, we subtract the least expensive alternative of off-premise consumption, deriving a figure of \$29.42. About \$29 per party-day, is, then, about the maximum level of expenditures that the occupant survey will support, and this assumes a level of under-reporting not really believed to exist.

The roadside outbound interviews yielded an average expenditure for food and lodging of \$14.55. It is widely held in studies of tourism that food and lodging account for about one-half of a traveler's daily expenditures. On this basis, the roadside survey results would support an average expenditure figure of about \$29. This expenditure level applies over a wider segment of tourists than the establishment occupant survey, because 38 percent of the roadside sample was comprised of persons not using commercial overnight accommodations on the day for which expenditures were reported. This compares with the approximately 15 percent representation of campers in the occupancy sample.

However, it should be recalled that the average from the roadside interview data is not an average per party-day, but an average expenditure per day per party among parties spending different numbers of days in the state. It is an average heavily weighted by parties spending only one or two days in the state, and the detailed breakdowns from the occupancy sample show rather strikingly that these short-time visitors are spending more per day than those who stay longer in the state. An expenditure per day figure to apply to an estimate of total party-days spent by tourists in the state must be a true average per party-day. Applying the expenditure averages for those spending varying length of time in the state, as determined from the occupancy data, to the distribution of parties by length of stay from the roadside survey shows that this difference in the *basis* of the averages in the two surveys accounts for about \$2 in the averages. That is, conversion of the occupant survey data to a per party basis would raise that average by about \$2, or conversion of the roadside survey data to a per party-day basis would lower that average by about \$2. The figure of \$13.27 for food and lodging shown under "all occupancy" in Table VII-4 is obtained by weighting the average expenditures by accommodation classes by the distribution of occupant-nights. The reduction from the per party average of \$14.55 is in line with the total conversion factor just mentioned.

Applying this last adjustment to the roadside survey data yields a per party-day expenditure level of about \$27.50 over all segments of the tourist population. To assert this as the applicable average, one must be prepared to assert that those using commercial overnight accommodations are spending around \$35 per day despite the fact that in the commercial or non-camper group in the occupancy sample the total of the expenditure averages *for those spending* in the several expense categories (excluding off-premise food consumption) is less than \$31. However, doubling the food and lodging figure for occupant of commercial establishments (Table VII-4) does yield \$34.80.

In summary, it seems extremely difficult to argue that over all days spent by all kinds of tourist parties in Montana expenditures average as much as \$30. Given

some generous biases, the occupant survey can support around \$29 among commercial establishment patrons and campers together, but this figure must then be extended to the non-commercial non-camper tourist segment which accounts for about one-third of all tourist party-days. These are parties staying with relatives and friends, or hauling trailers or sleeping in their cars, and their expenditure levels surely reduce the overall average to between \$25 and \$27.50. As indicated before, adjustment of the roadside survey level of expenditures to a per party-day basis yields an expenditure level also within this range. An expenditure average of \$27.50 per day, then, is regarded as the most generous level of expenditures applicable over all tourist party-days in Montana that can be defended by reference to the survey data. This is the figure we will apply to the estimate of total tourist party-days.

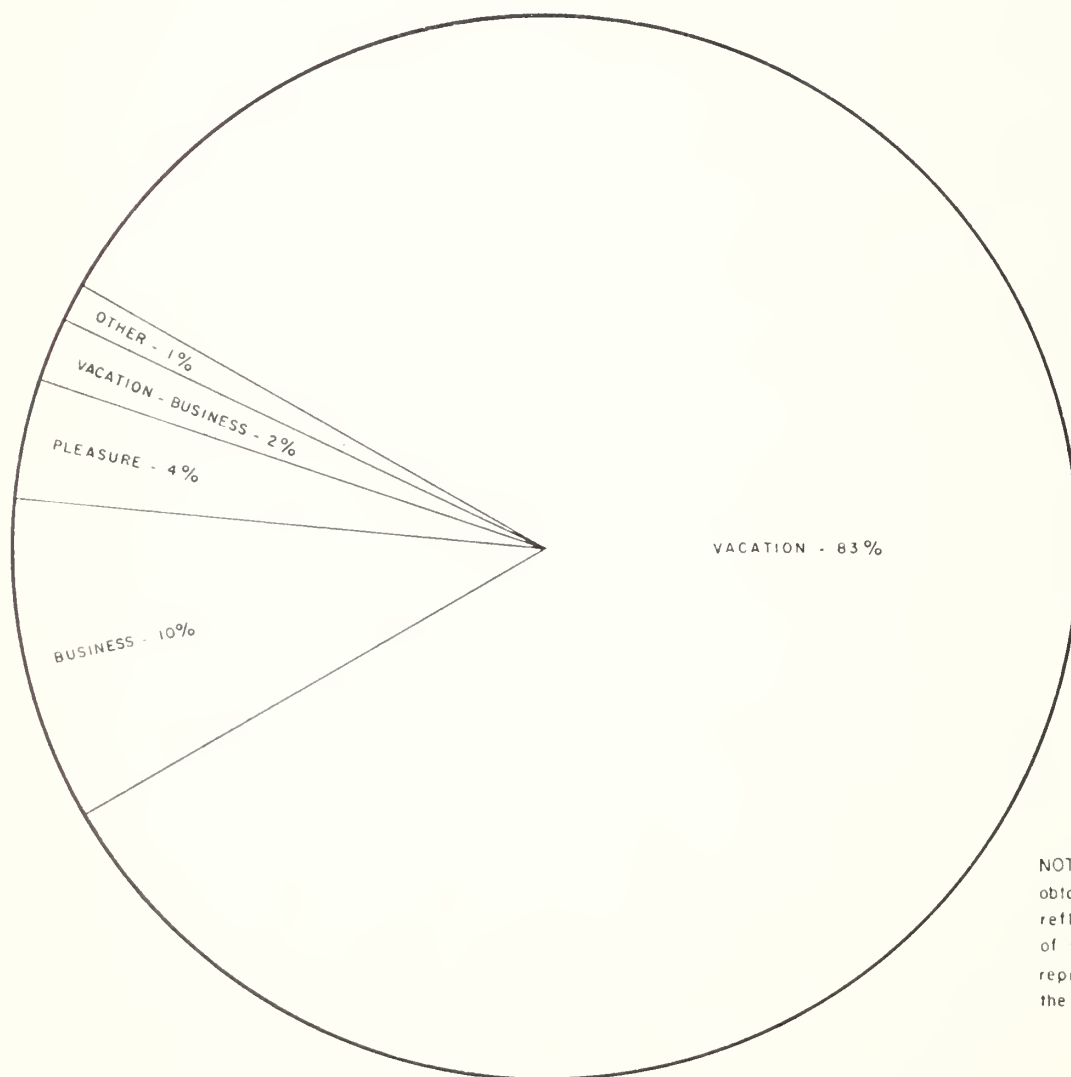
Total Tourist Party-Days in Montana

The surveys conducted lend themselves to three more or less independent estimates of the total party-days spent by all tourists in Montana. These stem from the actual check of occupants in 75 commercial establishments and 39 camping locations in the state, (2) responses of operators of commercial establishments concerning occupancy characteristics in a sample of 239 commercial establishments, and (3) counts of outbound traffic interviewed in the roadside survey at seventeen check points, as well as total entering foreign passenger vehicle traffic as determined by the Planning Survey.

Occupant Check Estimate. Occupant checks in 75 commercial establishments having 939 occupant units revealed 315 tourist parties. Thirty-seven units were missed by the interviewers, and on the basis of the ratio of two tourist parties to one business party prevailing in units that were checked, we would estimate that these units contained an additional 25 tourists, making 340 in all. These establishments were a stratified random sample of 1,127 establishments in the original listings. A check with Chambers of Commerce in places having 582 establishments in the original list revealed 231 establishments not in the original list, or 40 percent additional establishments. On this basis, a complete listing of establishments would have contained 1,578 names, and expansion of the results from 75 establishments to the complete list would produce 7,154 occupant parties per summer day. Camping interviews employing a one in twenty sampling ratio produced 58 campers representing an estimated average daily occupancy of 1,160 camping parties. Expanding average daily commercial establishment and campground occupancy of 8,314 parties to the entire summer season of 100 days, yields 831,000 commercial and camping tourist days for the summer season in Montana. Non-commercial non-camping occupancy, judged from the roadside survey data, runs 53 percent of commercial and camping occupancy. This additional occupancy is then estimated at 440,000 party-days, resulting in estimated total summertime tourist occupancy of all kinds in Montana of 1,271,000 party-days.

Based on the commercial establishment operator interviews, off-season occupancy averages 36 percent of summertime occupancy. Applying this ratio to the foregoing estimate of summertime tourist party-days produces 456,000 estimated party-days during the off-season. The resulting estimate of year-round tourist occupancy in Montana is 1,737,000 party-days.

FIGURE VII - 2
TRIP PURPOSE FROM ROADSIDE INTERVIEWS
OF
OUT BOUND MOTORISTS AT BORDER POINTS



NOTE: Since these interviews were obtained at border points, they would reflect a much higher proportion of vacation travel than would be representative of general travel in the interior of the state

Operator Interview Estimate. Interviews with operators of 239 commercial establishments revealed 198 establishments having 2,760 occupant units enjoying some tourist clientele. Average tourist occupancy per summer day in these establishments, derived from statements of operators, was 1,086 tourist parties. Expanding this occupancy rate to the estimated complete list of commercial establishments and to the entire summer season yields an estimate of 716,900 summertime tourist party-days in commercial establishments. Applying to this figure the ratio of non-commercial to commercial party-days from the roadside survey (.94) produces 673,900 non-commercial party-days during the regular season. Together, total summertime party-days are estimated at 1,390,800.

Operators of commercial establishments were also asked about their off-season tourist business. Expansion of this information to the entire list of establishments produces an estimated 261,000 off-season party-days in commercial establishments. On the assumption that the ratio of non-commercial to commercial party-days is the same off-season as in the summer, 245,900 non-commercial off-season party-days should be added, making total off-season occupancy of 507,500 party-days. Total part-days throughout the year are estimated, then, at 1,898,300.

Estimates from Counts at Check Stations. Total foreign passenger vehicles entering Montana over the period 15 June to 15 September are estimated from Planning Survey counts at 380,000. The proportions of entering vehicles representing vacation and pleasure trips during these months are available from the roadside survey data. Application of these figures yields an estimate of 358,000 entering out-of-state vehicles or parties. The average stay in Montana for out-of-staters in the outbound roadside interviews was 3.98 days. Applying this stay to total out-of-state summer tourist parties yields 1,424,000 party-days. The ratio of Montana to out-of-state occupancy during the summer season is estimated at 25 percent from the operator interviews, and application of this ratio produces an estimate of 356,000 summertime party-days for Montanans. The resulting total summertime tourist occupancy is 1,780,000 party-days.

Off-season out-of-state entrants run 50 percent of summertime entrants if from October through May entering traffic is composed of one-half tourists. This composition of traffic is an assumption appearing to be quite liberal as to tourist volume. The resulting estimate of off-season party-days by out-of-staters is 712,000. Off-season occupancy by Montanans is estimated from the establishment operator interviews at 47 percent of seasonal occupancy. Application of this figure to the summertime occupancy by Montanans results in 167,000 party-days contributed by Montanans during the off-season. The resulting over-all estimates are 879,000 off-season party-days and 2,659,000 party-days year round. This is the most liberal estimate obtained, for both of the off-season ratios are quite generous. On the other hand, the traffic count base is the more reliable of the several starting points.

Final Occupancy and Expenditure Estimates

Had the surveys yielded only one means of estimating total tourist party-days in Montana, we would be spared the apparent embarrassment of having to reconcile somewhat different estimates. More importantly, however, we would be much

less confident that the estimate was in the correct general range. As it is, the several estimates presented clearly suggest a figure of between two and two and a half million tourist days for the entire year in Montana.

In the accompanying table is presented a breakdown of 2,000,000 tourist party-days in Montana by time of year, kind of accommodations, and residence of tourist. The allocations are based on relationships among the several components of total occupancy as revealed by either the roadside survey or establishment operator survey.

The average expenditures per party-day over-all components of occupancy has been estimated in the preceding section at \$27.50. For 2 million party-days total expenditures are estimated, then, at \$55 million. Expenditures of \$69 million, corresponding to 2.5 million tourist days, are also quite plausible.

TABLE VII-1
Average Actual and Estimated Daily Expenditures
by Length of Stay in Montana, Occupant Survey

Length of Stay (nights)	Estimated Expenditures per Day	Actual Expenditures Preceding Day
1	\$26.88	\$26.72
2	24.14	23.12
3	23.92	23.22
4-5	23.20	23.30
6-9	19.08	19.00
10 and over	20.22	21.45
All Respondents	\$22.93	\$22.87

TABLE VII-2
Percentage Distribution of Actual Expenditures on Day Preceding
Interview, Campers, Non-Campers, and All Respondents
Occupant Survey

Expenditures	All Respondents	Campers	Non-Campers
Under \$ 2.50.....	0.8	6	....
2.50 - 7.50.....	4.0	22	1
7.50 - 12.50.....	10.4	24	8
12.50 - 17.50.....	17.3	19	17
17.50 - 22.50.....	19.7	13	21
22.50 - 27.50.....	22.6	6	25
27.50 - 32.50.....	13.3	6	15
32.50 - 37.50.....	4.2	2	5
37.50 - 42.50.....	3.7	2	4
42.50 - 47.50.....	1.1	....	1
Over 47.50.....	2.9	....	3
Total	100.0	100	100

TABLE VII-3

Previous Day's Expenditures by Class of Expense
and Type of Tourist Party, Occupant Survey, Summer 1958

Type of Party and Class of Expense	Average Expenditures All Parties*	Percent Spending	Average Expendi- tures Parties Spending
All Parties—Total.....	\$22.87 (excludes nine not responding)		
Lodging.....	5.95	74.8	7.96
Meals—on premise.....	4.82	74.8	6.45
Groceries.....	1.60	40.8	3.93
Gasoline and Automotive.....	7.26	85.7	8.47
Other Expenses.....	2.46	37.7	6.54
Montanans—Total.....	18.17 (excludes four not responding)		
Lodging.....	4.35	47	9.19
Meals—on premise.....	4.18	66	6.39
Groceries.....	1.84	41	4.45
Gasoline and Automotive.....	4.56	76	6.02
Other Expenses.....	1.83	41	4.43
Out-of-Staters—Total.....	23.66 (excludes five not responding)		
Lodging.....	6.22	79	7.84
Meals—on premise.....	4.97	68	6.46
Groceries.....	1.56	41	3.84
Gasoline and Automotive.....	7.75	87	8.88
Other Expenses.....	2.57	37	6.96
Campers—Total.....	13.41 (excludes five not responding)		
Lodging.....	.26	3	7.50
Meals—on premise.....	1.56	28	5.68
Groceries.....	3.96	71	5.60
Gasoline and Automotive.....	3.89	62	6.26
Other Expenses.....	2.67	52	5.17
Non-Campers—Total.....	24.42 (excludes four not responding)		
Lodging.....	6.98	88	7.98
Meals—on premise.....	5.40	83	6.49
Groceries.....	1.19	36	3.34
Gasoline and Automotive.....	8.55	90	9.54
Other Expenses.....	2.43	30	6.90

*Expenditures totaled for the several expense classes will not add to the figures given under "total" because expenses in particular expense classes are averaged over all parties, while the total expenditure per day averages exclude the number of respondents, as indicated, who did not indicate expenditures in any expense class.

TABLE VII-4

Average Expenditures per Party for Food and Lodging
by Type of Accommodation Used Previous Night, Percentage
Distribution of Occupant-Nights, and Implied Percentage
Distribution of Food and Lodging Expenditures by
Type of Accommodation Used, Roadside Survey

Type of Accommodation	Average Expenditures	Distribution of Occupant-Nights	Distribution of Total Food and Lodging Expenditures
Commercial			
Motel.....	\$17.76	44.0	58.9
Hotel.....	15.43	6.0	7.0
Tourist Rooms.....	14.89	1.7	1.9
Total.....	\$17.40	51.7	67.8
Non-Commercial.....			
Camping.....	\$ 7.97	15.2	9.1
Friends.....	10.75	4.6	3.7
Relatives.....	9.57	20.6	14.9
Home.....	8.68	1.3	0.9
Trailer.....	7.30	5.5	3.0
Car.....	7.62	1.1	0.6
Total.....	\$ 8.85	48.3	32.2
All Occupancy.....	\$13.27	100.0	100.0

TABLE VII-5

Distributions of Outbound Roadside Interviews,
Average Nights Spent in Montana, and Average Size of
Party by Origin-Destination, Trip Purpose, and
Type of Accommodation Used Previous Night

Classification	Distribution of Interviews Number	Percent	Average Nights in Montana	Average Size of Party
All Interviews.....	9,435	100.0	3.7	3.1
By Origin—Destination				
Montana to Montana.....	290	3.1	2.0	2.8
Montana to Other.....	643	6.8	0.6	3.0
Other to Montana.....	3,172	33.6	6.5	3.1
Other to Other.....	5,330	56.5	2.5	3.1
By Trip Purpose				
Vacation.....	7,843	83.1	3.8	3.2
Business.....	945	10.0	4.2	2.0
Pleasure.....	383	4.1	1.3	3.1
Vacation-Business.....	183	1.9	2.2	3.1
Other.....	69	0.8	4.7	3.0
Unknown.....	12	0.1	5.1	3.3
By Type of Accommodation				
Motel.....	5,217	55.3	2.9	3.1
Hotel.....	532	5.6	3.9	2.3
Tourist Rooms.....	72	0.8	7.9	3.2
Camping.....	1,165	12.3	4.5	3.5
Friends.....	289	3.1	5.4	3.0
Relatives.....	890	9.4	8.0	3.4
Home.....	756	8.0	0.6	2.9
Trailer.....	162	1.7	11.8	3.3
Car.....	195	2.1	1.9	3.1
Unknown.....	157	1.7	4.9	3.2

TABLE VII-6**Estimated Distribution of Two Million Tourist Party-Days
in Montana by Occupancy, Season, and Origin of Party**

Season and Origin	Commercial Establishments	Camping	Other Non- Commercial	Total
Summer—Montanans.....	150,000	63,000	102,000	315,000
Summer—Out-of-State.....	622,000	170,000	424,000	1,216,000
Total Summer.....	772,000	233,000	526,000	1,531,000
Off Season—Montanans....	70,000	.....	47,000	117,000
Off Season—Out-of-State.	210,000	.....	142,000	352,000
Total Off Season.....	280,000	.....	189,000	469,000
Total Montanans.....	220,000	63,000	149,000	432,000
Total Out-of-State.....	832,000	170,000	566,000	1,568,000
Total.....	1,052,000	233,000	715,000	2,000,000

VIII. THE RELATION OF TOURIST BUSINESS TO HIGHWAY INVESTMENT AND USE

Distribution of Highway Mileage and Out-of-State Traffic

From the out-of-state traffic counts by sections on the Federal Aid System in Montana compiled by the State Highway Commission Planning Survey, a rather complete study of mileage and traffic on Montana's principal highways can be made. The state was divided into three areas—northwest, central, and eastern Montana. These areas are combinations of the twelve highway districts in the state, which are in turn divisible into counties. Accompanying tables show the distribution of Federal Aid Primary System mileage and of out-of-state passenger vehicular traffic among the districts and areas. The differences in these distributions reflect the different average out-of-state traffic load on highways in the various areas. The different average loads are indicated by the average daily out-of-state passenger vehicles per miles of highway, which are also shown in the table. Here it can be noted that the Missoula district (No. 8), the Yellowstone Park district (No. 10), and the Billings district (No. 11), are the only ones with average year-round out-of-state traffic loads in excess of 200 vehicles per mile. These three districts account for a little less than 50 percent of the total primary system vehicle-miles of out-of-state traffic. Of the three broad areas, average traffic per mile is considerably higher in northwest Montana.

Mileage and highway traffic have similarly been studied for each of the 53 Federal Aid Primary routes. The ten routes each accounting for over 2 percent of the total "foreign" passenger vehicle miles on the Federal Aid Primary System in 1957 are summarized in Table VIII-2. These routes total about 58 percent of the Federal Aid Primary highway mileage in the state, but generate 80 percent of total out-of-state passenger vehicle use on the primary system. The differences in average vehicle load among these principal routes are considerable. The U. S. 10-12 complex, which includes Federal Aid routes 2, 8, and 17, has by far the heaviest use, and U. S. 2 also carries a heavy average load. These are the only routes averaging over 200 out-of-state passenger vehicles per day. The major north-south routes providing more direct access to the National Parks carry lighter average daily out-of-state traffic loads, generally in the range from 100 to 200 vehicles per mile.

Out-of-state traffic is, of course, a composite of those using Montana's highways as an avenue of access to other states and those using the highways for more direct access to points of destination or trip objectives in Montana. Some detail on the balance between through access and direct access use has been pointed out already in discussing the survey findings. Given the location of Glacier and Yellowstone National Parks, which are Montana's major tourist attractions, U. S. 10-12 and other east-west routes excepting U. S. 2 can be characterized as providing a combination of through access and indirect access to the Montana's principal tourist spots, while most of the state's major north-south routes and U. S. 2 provide more direct access to the national parks. The distribution of total highway use by "foreign vehicles has been determined by major route "systems" in the state with this distinction in the character of traffic by route systems in mind. We find

that the two route systems providing more direct access to the parks account for about 38 percent of the out-of-state highway use in the state, while major east-west routes providing a combination of through access and more generalized access to tourist objectives in Montana account for nearly half of all out-of-state travel. This division of miles of travel by directness of access, interestingly enough, corresponds fairly closely to the proportions of out-of-state tourists in the several survey of drivers who stated that they had an objective or trip destination in Montana.

Design of the Establishment Sample by Areas and Highway Routes

In order to insure estimates of tourist occupancy that could be properly compared with highway usage in the state, considerable care was taken to obtain rather complete geographic stratification of the universe of commercial establishments for tourist and operator interviews. The list of establishments was grouped by the twelve highway districts, and a set of three establishments was selected at random for each 15 establishments in the list in all places having seven or more establishments. All those places in each highway district having less than seven establishments were grouped together and designated as "remainders of districts." Then a set of three accommodation places for each fifteen establishments in the remainder of districts was randomly selected. All three establishments in each set became members of the operator interview sample, and a pre-designated one from each set of three became a primary sampling unit in the tourist interviewing at overnight accommodations places. Comparison of the distribution of establishments by areas in the complete list with the establishments brought into the operator interview sample indicates that the intended sampling plan was well executed by the field interviewers.

To check the adequacy of the sampling plan in relation to the primary network of Federal Aid highways, each city or town having commercial accommodations establishments in the original list of 1,127 establishments was classified according to the Federal Aid Primary route (or routes) on which it lay. From this tabulation, the distribution of all establishments by Federal Aid routes was determined, and compared with the distribution of establishments actually drawn in the sampling. That the rather complete geographic stratification of the sample also achieved a proportionate representation of establishments by Federal Aid routes can be appreciated from Table VIII-3. Here, the distribution of primary sampling units (sets of three establishments) by highway routes is compared with the number of units which would be required for a sample distribution exactly proportional to the distribution of the complete list of 1,127 establishments by highway routes.

Relationship of Establishments and Tourist Occupancy to Highway Mileage and Traffic

Some appreciation of the character of highway benefits to Montana's tourist industry can be gained by examining the location of commercial accommodations establishments in relation to mileage and to out-of-state passenger vehicle traffic on the Federal Aid Primary system. The distribution of establishments by areas and routes, when compared with the corresponding distribution of highway mileage or traffic, reveals whether the existence or use of the highways for tourist travel results in benefits proportional to highway investment and tourist use.

Table VIII-1 shows clearly the "gateway" character of eastern Montana. Districts 3, 4, 5, and 12 all show relatively great highway mileage in relation to establishment numbers. Only District 11 in the eastern Montana area (III) has less than five miles of Federal Aid Primary highway per establishment. This district includes Billings, probably the major overnight stopping place in eastern Montana. By contrast with most of eastern Montana, Districts 1 and 10, containing the areas adjoining Glacier and Yellowstone Parks respectively, have a large number of establishments in relation to highway mileage and presumably account then for a larger share of benefits than of highway investment.

The pattern by vehicle miles is generally similar but with some exceptions. Highway use in relation to potential benefits is high in eastern Montana, with an overall summertime ratio of about 3,000 miles of travel per establishment. Elsewhere, except in District 8 (Missoula), total travel per establishment is much lower, and is lowest in the Glacier-Flathead and Yellowstone Park areas (Districts 1 and 10). In the Missoula district (No. 8), while highway mileage per establishment is moderate, average daily traffic volume per mile is exceptionally high . . . over 300 vehicles. The result is that total travel per establishment is fairly high. Here, then, is an example of a moderate level of highway investment locally in relation to potential benefits, but a failure to capitalize fully on the high level of total usage of the highway mileage. This "failure" does not necessarily reflect errors in business judgment in the tourist industry, for there may be very real reasons why the traffic generated does not result in proportionate tourist business benefits. It reflects, along with the other examples, a lack of any fixed proportionate relationship, locally, between benefits to the tourist industry and measures of highway investment and use by a major segment of tourists.

The comparison in Table VIII-2 of establishment numbers to mileage and vehicular use of principal Federal Aid Primary routes and route systems amplifies this picture of varying apparent investment-benefit and use-benefit ratios. Concentration of establishment locations in relation to traffic is again seen in the finding that the two principal east-west routes (F.A.P. No. 1 and No. 2), which account for over half of primary system use by non-Montanans, have only about one-quarter of the tourist establishments. Principal north-south routes, (F.A.P. No. 3 and No. 5) providing more direct access to and between the national parks are among the few major routes having summertime daily travel per establishment ratios below that for the overall Federal Aid Primary System. Among the route "systems," the lower ratios of highway mileage to establishment numbers are found in the two complexes (No. 1 and No. 3) providing more direct access to the national parks.

The use of establishment numbers as an indicator of the presence of tourist industry benefits assumes tacitly that the capacity and tourist occupancy of various groups of establishments are proportionate to their number. Because the operator interview sample achieved a balanced stratification by areas and highway routes, we are in a position to extend the measure of benefits to establishment capacity and tourist occupancy.

Table VIII-4 summarizes the distribution of highway mileage, vehicle-miles of out-of-state travel, numbers of establishments, capacity of establishments, and tourists actually accommodated by major areas of the state. Our interest centers in

whether the indicators of tourist business (benefits) are distributed among areas in the same proportions as the indicators of highway investment (mileage) and use (vehicle-miles). In eastern Montana all the benefit indicators show benefits to the tourist industry less than proportionate to either highway investment or use. In central Montana all the benefit indicators are proportionately greater than the measures of investment and use. In northwestern Montana benefits are in greater proportion than highway investment, but owing to high usage per mile, roughly in proportion to total usage, especially as measured by capacity and by tourists accommodated. The drop in this ratio when measured by establishment capacity implies a smaller average size of establishment in northwestern Montana than elsewhere in the state.

Elsewhere we have estimated total year round tourist occupancy in Montana at about two million party-days, of which some 600,000 represents out-of-state summertime commercial occupancy. The slightly over one million out-of-state passenger vehicle-miles per day over the entire year shown in the accompanying tables implies total year-round out-of-state usage of the Federal Aid Primary system of approximately 380 million vehicle-miles. Judging from counts of entering traffic, 70 percent of this use may be said to occur during the 100 day summer season, or 266 million vehicle-miles. Thus it takes in Montana an average of about 450 vehicle-miles of out-of-state highway use to generate one party-day of out-of-state commercial tourist establishment occupancy during the summer season. Because of the different distributions of vehicle-miles and tourist occupancy among the three areas of the state, this use-benefit ratio varies areally. In northwest Montana it is about 425 vehicle-miles per party day, in Central Montana about 345, and in eastern Montana about 691 vehicle-miles per party-day.

FIGURE VIII-1

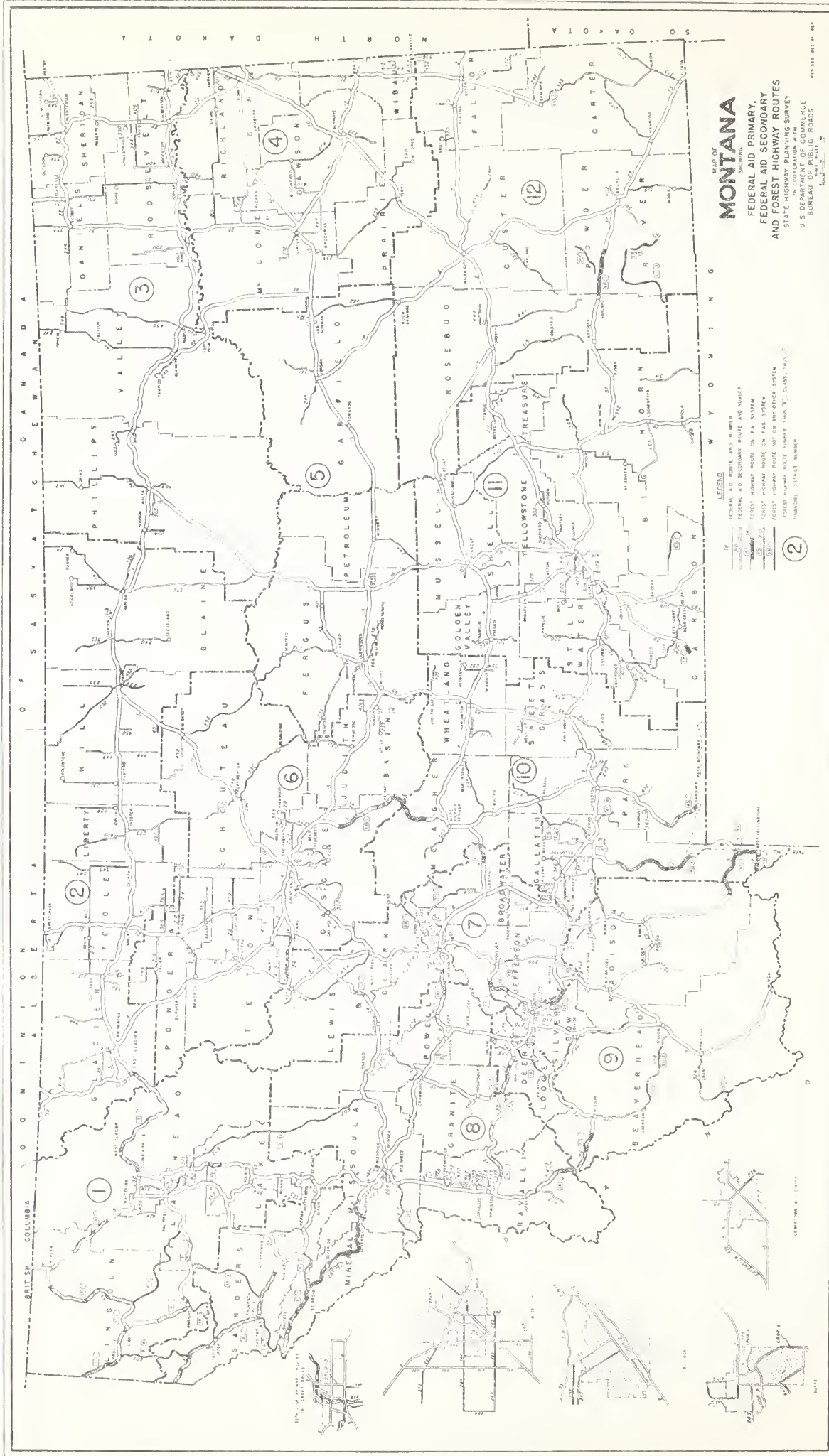


TABLE VIII-1

Comparison of Federal Aid Primary System Mileage, Out-of-State
Passenger Vehicle Traffic, and Commercial Accommodations Establishments
by Highway Districts and Areas of Montana

Area and District	F.A.P. Highway Mileage	Out-of-State Traffic Vehicle-miles per Day (yearly)	Number of Commercial Establishments	Average Traffic Load Vehicles per Day	F.A.P. Mileage per Establishment	Vehicle-miles-per Establishment per Day (summer)*
All Montana	5,649	1,063,544	1,575	188	3.6	1,726
I Northwest Montana	1,156	269,346	506	256	2.3	1,360
District 1	502	61,612	273	123	1.8	565
District 8	654	207,734	228	313	2.9	2,329
II Central Montana	2,179	397,763	725	183	3.0	1,401
District 2	391	78,044	110	199	3.6	1,807
District 6	474	59,204	123	125	3.8	1,231
District 7	376	64,261	87	171	4.3	1,836
District 9	422	74,104	115	175	3.7	1,653
District 10	516	122,150	290	237	1.8	1,073
III Eastern Montana	2,314	396,435	344	171	6.7	2,946
District 3	476	86,413	60	182	7.9	3,675
District 4	392	54,096	49	138	8.0	2,827
District 5	317	19,365	22	61	14.4	2,212
District 11	600	165,358	140	276	4.3	3,024
District 12	529	71,203	73	135	7.2	2,503

*2.555 times average yearly vehicle miles per day per establishment, based on assumption that 70 per cent of total out-of-state vehicle miles for the year occur during 100 summer days.

TABLE VIII-2

**Comparison of Highway Mileage, Out-of-State Passenger-Vehicle Traffic,
and Commercial Accommodations Establishments by Principal Federal
Aid Primary Routes and Route "Systems" in Montana**

Routes and Route Systems	Highway Mileage	Out-of-State Traffic Vehicle Miles-Per Day (Yearly)	Number of Commer- cial Estab- lishments	Average Traffic Load Vehicles Per Day	Mileage Per Estab- ment	Vehicle-miles Per Estab- lishment Per Day (Summer)*
F.A.P. No. 2.....	680	368,141	243	541	2.8	3,871
F.A.P. No. 1.....	664	152,806	148	230	4.5	2,638
F.A.P. No. 3.....	449	86,028	128	192	3.5	1,717
F.A.P. No. 16.....	254	44,903	61	176	4.2	1,881
F.A.P. No. 11.....	218	38,937	41	179	5.3	2,427
F.A.P. No. 15.....	359	47,870	95	133	3.8	1,288
F.A.P. No. 8.....	105	28,880	27	276	3.9	2,733
F.A.P. No. 5.....	182	23,872	58	131	3.1	1,052
F.A.P. No. 14.....	263	23,866	30	91	8.8	2,033
F.A.P. No. 17.....	71	22,137	24	312	3.0	2,357
Total Principal Routes....	3,245	837,440	855	258	3.8	2,503
Route System 1.....	673	153,309	260	228	2.6	1,507
Route System 2.....	1,655	518,730	466	313	3.6	2,844
Route System 3.....	1,452	246,764	501	170	2.9	1,259
Route System 4.....	434	65,104	128	150	3.4	1,300
All Other.....	1,458	66,154	220	45	6.6	769
All Montana.....	5,672**	1,050,061**	1,575	185	3.6	1,704

*2.555 times average yearly vehicle miles per day per establishment, based on assumption that 70 percent of total out-of-state vehicle miles for the year occur in 100 summer days.

**Includes some coincidental mileage.

Source: Montana Traffic by Sections in Federal Aid Systems, 1957 State Highway Commission Planning Survey in Cooperation with U. S. Department of Commerce, Bureau of Public Roads.

Principal Federal Aid Primary Routes:

- F.A.P. 2: U.S. 2 including West Glacier Spur, and Montana 49.
- F.A.P. 1: U.S. 10 and 10S Idaho line to Miles City; U.S. 12 to N. Dakota line.
- F.A.P. 3: U.S. 91 Idaho line to Great Falls; U.S. 89 Great Falls to Canada line.
- F.A.P. 16: U.S. 87 from Wyoming line continuing on Montana 19 north of Grass Range to Malta.
- F.A.P. 11: U.S. 89 from Wyoming line near Gardiner to Great Falls.
- F.A.P. 15: U.S. 87 from U.S. 89 near Great Falls continuing on Montana 18 to Glendive; U.S. 10 from Glendive to N. Dakota line near Wibaux.
- F.A.P. 8: U.S. 10N from Garrison to Three Forks.
- F.A.P. 5: U.S. 93 west of Missoula to Canada line.
- F.A.P. 14: Montana 6 from Townsend to U.S. 10 at Forsyth.
- F.A.P. 17: U.S. 10 Miles City to Glendive.

Route System 1 (East-West "Hi-Line")—F.A.P. No 1, 38

Route System 2 (East-West Other)—F.A.P. No. 2, 6, 8, 14, 15, 17, 20

Route System 3 (North-South "Parks")—F.A.P. No. 3, 5, 7, 10, 11, 12, 13, 21, 28, 29, 50

Route System 4 (North-South Other)—F.A.P. No. 4, 16, 18, 42

TABLE VIII-3
Number out of Eighty-One Original¹ Sample Units
Located on Each F.A.P. Route and Number out of Eighty-One
Required to Achieve Proportionate Representation of Original
Establishment Listing by F.A.P. Routes

F.A.P. Route	Sampling Units		F.A.P. Route	Sampling Units	
	Proportionate Number	Actual Number		Proportionate Number	Actual Number
1	14	19	28	1	1
2	23	24	29	1	1
3	12	11	30	----	----
4	1	1	31	----	----
5	6	7	32	----	----
6	1	3	33	1	1
7	5	4	34	----	----
8	3	1	35	----	----
9	2	2	36	4	4
10	5	5	37	----	----
11	4	3	38	1	2
12	7	6	39	----	----
13	8	7	40	----	----
14	3	2	41	----	----
15	9	7	42	2	1
16	6	4	43	1	1
17	2	2	44	----	1
18	2	2	45	2	2
19	4	4	46	----	1
20	1	1	47	1	1
21	2	2	48	----	1
22	----	----	49	----	----
23	2	2	50	3	2
24	2	1	51	----	----
25	----	1	52	5	4
26	----	----	53	4	3
27	1	1			

*Two of the original 83 original sampling units were not located on F.A.P. routes.

TABLE VIII-4
Distributions of Federal Aid Primary System Mileage and Traffic,
Compared With Numbers, Capacity, and Tourist Occupancy
of Commercial Accommodations Establishments by
Areas in Montana

Factor	Northwest Montana	Central Montana	Eastern Montana	All Montana
F.A.P. Mileage (%).....	20.5	38.5	41.0	100.0
Out-of-State				
Vehicle-Miles (%).....	25.3	37.4	37.3	100.0
Establishments—				
Original List (%).....	32.1	46.1	21.8	100.0
Establishments—				
Interview Sample (%).....	33.5	44.7	21.8	100.0
Occupant Units—				
Interview Sample (%).....	27.7	45.4	26.9	100.0
Tourist Occupancy—				
Interview Sample (%).....	26.8	48.8	24.4	100.0

APPENDIX A

THE VALIDITY OF MAIL-RETURN TOURIST SURVEYS

As long as interviewers were covering the state in carrying out assigned occupancy checks, occupant interviews, and establishment operator interviews, an experiment was conducted with a mail-return survey method at little additional out-of-pocket cost to the survey project. The rather closely controlled sampling procedures in the occupant and establishment surveys are mandatory when expansion of the survey data to absolute levels of critical magnitudes in the tourist population is desired. However, less rigorous sampling methods *may suffice* if all that is required of the data are estimates of the relative frequency of occurrence or of the average values of various characteristics in the tourist population. Such characteristics are typically the percentage of home-staters, the percentage with destinations in the state of interest, average trip duration, average amount budgeted for the trip, average expenditures per party, and so forth. However, most investigators quite properly hesitate to use less controlled techniques because they are not sure whether the lack of control at certain points will lead to bias in estimating average characteristics. Therefore, more controlled techniques are used as insurance against these biases. Were it known that the lack of certain kinds of control in a sampling procedure did not influence the survey results appreciably, then survey resources could be more effectively used by resort to less formal methods. One can only know this, however, through a comparison of controlled and informal techniques applied to the same population at the same time. This was the reason for conducting the supplementary mail-return survey at the same time as the more closely controlled occupant survey. While the comparative results may not apply to other tourist surveys conducted in other places, they are certainly suggestive, and other investigators may wish to consider them.

The interview form in the mail-return survey repeated a number of questions from the tourist occupant survey. Twenty packages of fifty interviews each were left with motel operators in locations selected only to achieve a "reasonable" geographic dispersion over the state. Selection was purposely made to obtain high-traffic motels with operators who seemed willing to cooperate in distributing the questionnaires. The fifty questionnaires were placed in a box on the counter or desk in the motel office with an attached sign, "Montana Tourist Survey—Take One." No special instructions were given the operators. Three hundred and fifty of the thousand interview forms were returned by tourists.

The mail-return sample, like the occupant survey, is essentially a sampling of tourist party-days. In both cases, exposure of a tourist party to the chance of inclusion in the sample varies as the duration of stay in Montana. Differences in responses to the identical questions stem from a combination of sources. Chief among these are the differences in establishment coverage . . . no hotels or campgrounds, or smaller motels were included in the mail survey . . . and the voluntary character of response to the mail questionnaire. In these respects the occupant survey results are regarded as correct, and interest centers on the kinds of information items in which the mail-return method produces significantly different results. Another source of difference is the presence or absence of the interviewer. Here either or both methods may be biased. Where both surveys produce substantially the same

results, however, we may conclude that the lack of control over selection of respondents in the mail survey has insignificant practical consequences. Grouped by subject matter, a comparative analysis of the two survey methods revealed the following:

Characteristics of Parties. The mail-return substantially underestimates the percentage of parties from Montana, neighboring states, and Canada, and overestimates the percentage from more distant states. The mail-return also overestimates the percentage of parties in the professional and technical occupational class. There was no difference in the average size of party, although the mail-return produced a significantly larger proportion of two person parties.

Destinations. No significant difference could be found in major destination items. The percentage of parties with Montana destinations, the percentage of parties who listed Glacier or Yellowstone Park as their destination, and the regional distribution of out-of-state destinations were all checked, with no measurable differences appearing.

Trip Characteristics. Total trip durations did not differ markedly between the two surveys, but length of stay in Montana did, with the mail return producing a larger proportion of one and two night durations, and a smaller proportion of parties staying six nights or more. This difference is thought to arise more from the different establishment coverage than from the voluntary response factor. In amounts budgeted for the entire trip, the mail-return average was \$100 in excess of the average from the occupant survey (\$511 to \$411). The respondents' estimates of expenditures per day averaged \$27.12 in the mail-return sample, as compared with \$22.93 for the entire occupant survey and \$24.10 for non-campers in the occupant survey.

Travel Characteristics. Average miles traveled "a day" and average miles traveled "today" as revealed by the mail-return survey are somewhat greater than in the occupant survey. The sample difference of 20 miles in the former is barely significant, however. In the latter, the sample difference is a little greater, but not substantively large.

Activities. In general, the percentages of respondents claiming participation in various activities while in Montana is higher in the occupant survey than for the mail-returns. Here is an instance where the presence of the interviewer may have biased the responses in the occupant survey. Even taking this lower general level of claimed participation in the mail survey into account, the prevalence of camping and horseback riding among respondents to the mail survey is extremely low. The interviewer bias in the occupant survey may be especially acute on these items, or more likely it simply reflects difference in establishment coverage.

In summary, it appears that the mail-return survey produced biased results as to state of origin of parties, but not as to destinations. The traveler from Montana or its immediate surrounding area perhaps does not consider himself a "tourist" and thus is not as likely as others to pick up and complete a voluntary questionnaire labeled "tourist survey." This difference in composition of the two samples could account for some, but by no means all, of the differences in the budget and expenditure items. The occupational and expenditure bias is just what many researchers would expect to encounter from a voluntary response survey. The differences in mileages traveled and length of stay in the state do not seem attributable to the voluntary response factor, the procedural difference of greatest interest.

APPENDIX B

A SUPPLEMENTAL STUDY OF CAMPERS

The Sample of Campgrounds

The sample of campgrounds can be considered in three parts. A list of campgrounds in the National Forests and the number of campsites at each ground were secured from the Forest Service. A similar listing, though lacking as to complete data on numbers of sites, was obtained from the State Highway Department to cover campgrounds maintained by the Highway Department, the State Parks Department, and other public and private agencies. The campgrounds in each of these lists were divided according to the three geographic areas of the state, and a set of three grounds drawn systematically for each twenty grounds in each list in each of the areas. In all three of the grounds in each set, night-time occupancy was counted and classified as between Montanans and out-of-staters. In a pre-designated one from each set of three grounds, interviews were made with every occupant party that could be located on afternoon or evening of interviewing. Thus in these two classes of grounds, the sampling pattern was exactly analogous to that employed in commercial accommodations establishments . . . three sites checked for occupancy rates to one site employed for actual interviews with tourists. The sampling fraction of one in twenty rather than one in fifteen was employed because preliminary estimates of the ratio of tourists present to tourists actually interviewed in the establishment sampling indicated that the actual sampling ratio for tourists at commercial accommodations places would be nearer to one per twenty daily occupants than one per fifteen occupants. It was anticipated, and later substantiated, that the interviewing situation at campgrounds would lead to an actual sampling ratio virtually equal to intended ratio.

The campgrounds in Glacier National Park were divided into three strata according to the size of the campground. One campground was drawn randomly from each strata, and interviews scheduled in that ground according to a sampling fraction designed to produce a one in twenty sampling of campers from the entire strata. Total occupancy in Glacier Park was estimated from this one in twenty coverage, while in the National Forests and other campgrounds, occupancy was estimated from a coverage of three grounds in twenty. Greater coverage in these grounds was advisable owing to their greater diversity in location and general character. The final sample of campgrounds included 24 campgrounds in the National Forests and 12 in the assorted Highway Department listing excluding National Forests, in addition to the three grounds selected in Glacier National Park.

Numbers of Grounds, Capacity, and Occupancy

The listing of campgrounds employed in the sampling included 16 grounds in Glacier Park with an indicated capacity of 581 parties and 158 campgrounds in the National Forests with a listed capacity of 977 parties. Of these National Forest campgrounds, 44 are in northwestern Montana, 103 are in central Montana, and 11 are in eastern Montana. There were 78 grounds exclusive of National Forests in the Highway Department listing, including 11 maintained by the State Parks De-

partment, 19 by the Highway Commission, and 48 by other public and private agencies. Indications of capacity, not a hard and fast figure in any event, were especially vague and often lacking entirely in this list. If the average in these grounds is assumed to correspond with National Forest campgrounds (6.2 sites per campgrounds), this list would represent a capacity of 484 parties. Thus, we would estimate the capacity of generally recognized camping spaces in Montana to be 2,042 parties.

Based on the counts obtained in the manner described, occupancy per summer night at all listed campgrounds in the state is estimated at 1,180 parties, an average occupancy in relation to estimated capacity of 58 percent. Apparent percentage occupancy is vastly different for the several classes of campground. Our figures place Glacier Park occupancy at 86 percent of capacity, and National Forest campground occupancy at 39 percent of capacity, while other campgrounds fall in between, at 62 percent. The division of occupants between Montanans and out-of-staters in each class of campground is interesting in this connection. Over-all, 27 percent of the camping parties included in the counts were Montanans. However, only 8 percent of those encountered in the National Park campgrounds and 11 percent of those found in the miscellaneous listing of grounds were Montanans. Sixty-five percent of the camping parties found in National Forest campgrounds were Montanans. This is interesting in view of the accessibility of the several classes of grounds. Generally speaking, the camping locations in the Highway Department listing and those in Glacier Park, excluding some of the smaller grounds there, are much more accessible than most of the grounds in the National Forests. It is fair to say that Montanans tend to seek out the less accessible campgrounds, for 77 percent of the Montanans counted in all camping places were in the National Forests. Accessibility may be more important to a large group of more casual, out-of-state campers. The only National Forest campground sampled in which out-of-staters greatly outnumbered Montanans was, significantly enough, a campground directly on a major highway link (Beaver Creek, near Hebgen Lake). Most of the Forest Service grounds are at varying distances off the primary highway network, and only a relatively small minority (15%) of out-of-staters appear to seek them out.

The largest single group of campers appear to be out-of-staters camping in Glacier Park (39%). This is followed by out-of-staters at highway roadsides, state parks, and other grounds (23%), and Montanans using campgrounds in the National Forests (21%). Possible incompleteness in the original listing of camping locations, and the existence of a population of campers not using organized camping facilities should be kept in mind. To the extent that this supplementary population includes out-of-state parties, it is included in the sampling of tourists in the roadside interviews at points of entry and exist from the state.

Additional Information About Campers

The same questions were asked of parties interviewed at campgrounds as were asked those in commercial accommodations establishments. Where the characteristics or responses of campers were markedly different from non-campers, such note has been made elsewhere in this report. This section is concerned only with a supplementary list of questions (see Appendix C) relating specifically to camping which were asked of campers only.

It should be recalled that actual interviews with camping parties at National Forest campgrounds and other campgrounds in the Highway Department listing were conducted in only one out of each three campgrounds selected for the occupancy count of campers. This amounts to a sampling of one twentieth of the average daily occupancy of the listed campgrounds, the same sampling fraction as secured by the interviews at Glacier Park in the three campgrounds representing the strata of large, medium and small campgrounds. Fifty-eight interviews were thus secured, representing an estimated average nightly campgrounds occupancy in the state of 1,160, which agrees very closely with the estimate of 1,180 secured from the larger occupancy count. Sixteen of these 58 camping parties were Montanans, a ratio of 29 percent which agrees quite closely with the 27 percent for Montanans in the expanded occupancy count. Thus, while this sub-sample of camping parties is small, it would appear to be representative of the larger sample of parties merely counted and classified, and by virtue of the systematic selection process, an unbiased sample of average daily occupancy in all of the listed campgrounds.

Two-thirds of the parties encountered were carrying some kind of tent, and about 90 percent appeared to have some variety of sleeping gear and cooking equipment. Differences between Montanans and out-of-staters were not material given the limited size of the sample. About one-third of the parties were hauling some sort of trailer, house trailers being most common, followed by luggage and camping trailers.

Sixty percent of the parties had been camping during prior vacations for five years or more, and 40 percent had been camping on vacations for more than ten years. Generally speaking, then, Montana's camping population is a veteran one, with only a very small percentage of real novices. The group also spends a considerable number of days camping per year. Only twenty-three percent of the groups sampled spend less than two weeks camping during the year. The most typical duration is between two and three weeks (40%), while 37 percent of the group indicated that they would probably spend over three weeks camping.

About a third of the campers indicated that they had spent some nights in commercial accommodations places on this trip. This figure, however, was nearly one-half for out-of-staters and less than one in ten for Montanans. Over one-half had camped at other locations than the point of interview during the current trip, the most frequently mentioned place being Glacier National Park. If those who had camped at Glacier during the current trip are added to those encountered at Glacier, somewhat over one-half of Montana's camping population would be estimated to have included some camping in Glacier during the current trip. Given the predisposition of Montanans toward the National Forests, this figure is probably close to two-thirds if confined to the out-of-state group.

The average number of nights camped in Montana per party on the current trip, as estimated from the sample, is 2.9 nights. On an occupant day basis (the average campsite occupant as opposed to the average party who camps) the average is six nights. This suggests, as was true for all tourists, that a large share of total use of overnight facilities is accounted for by a relatively small proportion of parties who stay a substantial time in the state. Even so, comparison of this figure with the average number of days camped per year for the occupant sample re-

veals that out-of-staters as a group spend but a small fraction of their total camping experience for the year in Montana. Admittedly at a somewhat slower pace than non-campers, they seem like other out-of-state tourists to be merely passing through the state on a broad sweep over the west generally. Glacier, obviously, is a camping location scheduled or anticipated in advance. Except for Glacier, any reasonably accessible roadside campground appears to fill the bill. The distribution of out-of-state camping parties among the several classes of campgrounds previously referred to lends strong support to this interpretation.

Mention has already been made that about one-third of all campground and about one-half of out-of-state occupants made some use of commercial accommodations during the current trip. The most frequent occasion for use is not by choice, however, but was ascribed to inclement weather or poor camping facilities. About one-third of commercial establishment occupancy by those primarily on camping trips, however, appears to be purposive and habitual for such purposes as occasional cleaning up. About one-half of the group sampled took meals occasionally in commercial eating places, but only with a very few was this a daily occurrence.

Practically all the Montanans encountered had already or planned to enjoy other camping trips in Montana this year. The average days expected to camp out this summer in Montana for this group was 22. On the out-of-staters about 60 percent had camped in Montana other years, and over two-thirds of these had camped in Montana within the past two years. The predominant location of camping in Montana was Glacier Park.

In summary, the average occupant of a campsite in Montana appears to be an inveterate camper. He has enjoyed camping for many years, is well equipped, and spends a considerable number of days camping each year. The typical out-of-stater, who has camped in Montana before, gravitates toward Glacier and then on out of the state probably seeking other comparable attractions. The typical Montanan seems to be endeavoring to escape from the flow of non-Montanans and their typical haunts. Both use commercial accommodations, if at all, out of necessity rather than choice.

TABLE B-1
Number of Campgrounds and Camping Sites in Available
Listings by Type of Campground

Type of Campground	Number of Campgrounds	Number of Camping Sites
National Forests		
Bitterroot.....	8	40
Flathead.....	16	70
Kaniksu.....	1	6
Kootenai.....	4	15
Lolo.....	15	79
Beaverhead.....	28	128
Deer Lodge.....	24	177
Gallatin.....	33	218
Helena.....	6	64
Lewis and Clark.....	12	98
Custer.....	11	82
Total National Forests.....	158	977
Glacier Park.....	16	581
Other		
State Parks.....	11	
Highway Commission.....	19	
Unclassified.....	48	
Total Other.....	78	484*
All Listed Campgrounds.....	252	2,042

*Assuming same number of sites per ground as in National Forests.

TABLE B-2
Estimated Capacity and Average Daily Occupancy
of Listed Campgrounds, and Distribution of Occupancy
by Type of Campground and Origin of Party

Type of Campground	(parties)	(parties)	Percent of Daily Occupancy		Total
			Montana	Out-of-State	
National Forests.....	977	380	21	11	32
Glacier Park.....	581	500	3	39	42
Other.....	484	300	3	23	26
All Listed Grounds...	2,042	1,180	27	73	100

APPENDIX C
INTERVIEW SCHEDULES AND OTHER FORMS
INSTRUCTIONS FOR INTERVIEWS

1. Check every occupant unit if establishment has 15 or less.
2. Check every other occupant unit if establishment has 16 or more, beginning with unit listed number 1 if the number of occupant units is odd, and beginning with unit listed 2 if number of occupant units is even.
3. The occupant unit check is the first "order of business." Proceed with the check, taking care of "business" or business connected" guests who may have arrived, since this may be done quickly.
As you encounter tourist parties on this "check" you can introduce yourself and the survey, indicating that you will be back shortly or setting a specific later time as seems most appropriate.
4. Check with the operator the following morning to get the listing of vacant units, and number of parties arriving after 10 p. m. Record this under "comments" on the appropriate line.
5. If you were unable to complete the occupant unit check the first evening and are staying another day to complete the tourist interviews, report the occupant unit status for the following evening for any units missed originally. If you are not staying over another interviewing day, and the occupant unit check list is for some reason incomplete (occupants unavailable), note this on the occupant check list under "comments" before turning it in and on a list for yourself. If you have occasion to return, follow the procedure in (6).
Stay over for another interview day in places with less than 15 occupant units *only if* you have completed less than half of the tourist interviews. In places with 16 or more occupant units we must have as many tourist interviews as the occupant check indicates. Stay over if there is a reasonable day's work remaining, or return another time to complete isolated tourist interviews, following the procedure in (6).
6. On any subsequent interview days, complete the tourist interviews for the units occupied by tourists on the initial occupant unit check. Try initially for an interview in the same occupant unit, but if the subsequent occupant is not a tourist or if the unit is not occupied when you call, substitute a tourist party from another unit. If you were able to note at the time of the occupant unit check that the original tourist party was from Montana, the preferred substitution would be another Montana party. Any out-of-state party may be substituted similarly for a previous out-of-state party missed.
7. An alternative procedure in situations calling for a larger number of occupant unit checks (i.e. a 40 unit establishment in which twenty checks are to be made) is to divide the occupant unit check into two parts, checking the first half of the sample units the first evening and the second half the second evening. All of the previous instructions would apply separately to each half of the listing.

Weekday ☐Weekend Hol. ☐**OCCUPANT UNIT CHECK SHEET**

District No..... PSU..... Place.....

Name of Motel, Hotel, etc.....

Address.....

Highway Location.....

Description.....

No. of Occupant Units.....

Interview Number	Occ. Unit	Montana Plates				Other States				Not Com- pleted		Time of Arrival	Comments	Interviewer Initial
		Business	Bus.-Ind.	Tourist	Other	Business	Bus.-Ind.	Tourist	Other	Vacant	Occupied			
1														
2														
3														
4														
5														
6														
7														
8														
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23														
24														
25														

Interviewed by	Date	No. of Completed Tourist Interviews	No. of Refusals

OPERATOR INTERVIEW

Interviewer.....

Date

District No..... PSU..... Place.....

Name of Est.....

Address..... Highway Location.....

Description.....

1. Number of occupant units in establishment.....
2. What would you estimate that your percentage of occupancy has been since June 15?.....
3. Taking just the summer season, what proportion of your occupied units would you estimate are filled by tourist parties?.....
4. How is this divided between out-of-staters and Montanans? Out-of-state..... Montana.....
5. Are you open year-round? Yes..... No.....
6. If not open year-round, what is your season?.....
7. What proportion of your business would you say is done in the three months from June 15 to Sept. 15?.....
8. During the other months, what proportion of your occupied units would you estimate are filled by tourist parties?.....
9. How is this tourist business divided between out-of-staters and Montanans? Out-of-state..... Montana.....
10. What is your usual price range (summer season) for your units:

		Single	Double
By day	without meals		
	with meals		
By week	without meals		
	with meals		

11. Occupancy data for previous seven days:

MONTANANS									
No. of days out of 7	No. in Party								Un
	1	2	3	4	5	6	Ov	6	
1									
2									
3									
4									
5									
6									
7									

OUT-OF STATE									
No. of days out of 7	No. in Party								Un
	1	2	3	4	5	6	Ov	6	
1									
2									
3									
4									
5									
6									
7									

UNKNOWN									
No. of days out of 7	No. in Party								Un
	1	2	3	4	5	6	Ov	6	
1									
2									
3									
4									
5									
6									
7									

Comments.....

Respondent.....

Interviewer..... P.S.U.....
 Date of Interview..... Occ. Unit No.....
 Site of Interview.....
 Highway Location.....

QUESTIONNAIRE
MONTANA STATE UNIVERSITY TOURIST SURVEY, 1958
QUALIFYING QUESTION

Are you on vacation from your usual work?..... Yes..... No.....
 (If yes, proceed with "Travel Party")

If answer is "no" ask: "Are you on a business trip?".....	Yes..... No.....
If yes, ask next two questions:	
In what state is car registered?.....	.....
About how many nights during the summer will you be using commercial accommodations in Montana?.....	.....
Then terminate interview with business party.	
If respondent uncertain ask:	
Are you including some vacationing on this trips?.....	Yes..... No.....
If yes—Ask sections on Travel Party, Trip, Costs, Route Used Only.	

THE TRAVEL PARTY

Are you travelling by car?..... Yes..... No.....
 If No: What means of travel are you using?

In what state is the car registered?.....

How many people are there in your party, that is, travelling
 in your car?.....

Male	Female	Total
------	--------	-------

Are there any children in the party?..... Yes..... No.....
 If yes, how many?.....

What age groups:

Preschool .....	.....
Ages 6-12 .....	.....
Ages 12-18 .....	.....
Age distribution of adults (by observation)	(Total Adults)
Ages 19-40 .....	.....
Ages 41-60 .....	.....
Ages 61 and over.....	.....

What is the occupation of the head of the family?

PLANNING THE TRIP

What is, or was, your principal destination on this trip?.....

About when did you decided to make this trip?

Who first brought up the idea of this trip?.....

Is this your principal vacation trip for this summer? Yes..... No.....

About how much money did you budget for this trip?.....

If trip is principal vacation, is this about the same as you
spend every summer for your vacation trip? More? Less?

Ask The Following of Out-Of-State Parties Only:

Has anyone in your party ever visited or vacationed in Mon-
tana before? Yes..... No.....

If yes:

On a vacation trip?..... Yes..... No.....

On a business trip?..... Yes..... No.....

Formerly lived in Montana?..... Yes..... No.....

Do you have any friends or relatives who have visited in
Montana? Yes..... No..... Don't Know.....

If yes, what have they told you about Montana?

Do you have any friends or relatives living in Montana that
you will see on your trip in the state?..... Yes..... No.....

If yes ask:

Will you stay any nights at their homes?..... Yes..... No.....

If yes—how many nights.....

THE TRIP

How many days have you planned on being away from home
on this entire trip?.....

How many nights will you have stayed in Montana?

What is the farthest point away from home you will have
reached on this trip?.....

What places do you feel are the high points of your trip?.....

ACTIVITIES

Out-Of-Staters Only

Here is a list of things some people do while on vacation. (Hand Card)

Will you tell me which things your party has done or plans to do in Montana?

General sightseeing	Shopping
Taking pictures and snapshots	Water sports (boating, swimming)
Horseback riding	Watching for rocks, flowers, animals, birds..
Hiking or walking.....	Fishing
Visiting historic places and markers	Camping
Attending rodeos, horseshows	Other sports (golf, tennis, etc.)
Other (specify)	

Is there any activity that you planned to do in Montana that you have found generally unavailable to you? Yes..... No.....
What?

Have you found things to do or places to see in Montana that you had not anticipated?..... Yes..... No.....

If yes:
What?

Montana Residents Only

What things did your party do or are you planning to do on your vacation trip to.....

THE ROUTE USED

Here I have a highway map of Montana. Can we trace your route from where you entered Montana (home) to where we are now, indicating overnight stops and attractions visited? Yes..... No.....

What are your plans from here? Can we note them in the same way?

In choosing your route in Montana, were the following important to you?

(Interviewer . . . Vary Order In Mentioning)

Speed Yes..... No.....

Scenery Yes..... No.....

Less traffic Yes..... No.....

Better roads Yes..... No.....

Did you receive help from anyone in planning your route?..... Yes..... No.....

If yes:

From whom?

Have you used any State numbered highways in Montana as opposed to U. S. numbered highways?..... Yes..... No.....

If yes:

How do they compare with the U. S. Routes?

If no:

How do you think they would compare with the U. S. routes?

On an average, how many miles a day do you usually travel?..

How many miles did you travel today?.....

What is your travel pattern in Montana. That is, are you driving hard one or two days, then relaxing in one spot, or are you driving about the same number of miles every day?

Did you plan your overnight stops before you left home?..... Yes..... No.....

If no:

Do you plan your next overnight stop before you leave each morning? Yes..... No.....

Do you usually make an accommodation reservation in advance? Yes..... No.....

COSTS

We'd be interested in what it costs people to vacation in Montana. Can you tell me what you spent YESTERDAY for?

Lodgings
Car operation . . . gas, oil, etc.....
Meals in cafes, restaurants.....
Food bought in grocery stores.....
Other purchases and expenses (souvenirs, gifts, admissions, entertainment, etc.).....
In general, what do you figure it costs your party per day when on a vacation trip such as this one?.....

ADVERTISING

For Out-Of-Staters Only

Have you seen or received any advertising or literature about travelling or vacationing in Montana?..... Yes..... No.....

If yes:

Would you describe it:

Do you remember having seen vacation or travel advertisements about other states?..... Yes..... No.....

If yes:

Which states?

All Respondents:

Did your family take a vacation trip last year (1957) Yes..... No.....

If yes:

Where did you go?.....

What attracted you there?.....

Tell me what you can about your vacation experience so far in Montana: How does Montana compare with other areas you have visited, is Montana what you expected it would be, what about Montana do you like most, what are its shortcomings, do you think you may return another year, would you recommend it to your friends and relatives?

SUPPLEMENTAL QUESTIONS FOR CAMPGROUND INTERVIEWS

EQUIPMENT: Describe type owned, if any:

A. Campers (Those not using house trailers.)

1. Tent
2. Sleeping
3. Cooking
4. Other (as, bucket, shovel, etc.).....

B. Trailers

How many years has your family been camping during your annual vacation?.....

About how many days a year does your family camp out?.....

Since leaving home on this trip, have you camped elsewhere or spent any night in commercial accommodations? Camped..... Commercial..... Both.....

(If camped elsewhere), where in Montana?.....

How many nights will you be camping out in Montana on this trip?.....

How many nights will you be staying in commercial accommodations in Montana?.....

Under what circumstances do you use commercial accommodations? (Describe).....

Do you occasionally eat meals in cafe's or restaurants?

Yes

No

If yes, how often?..... For which meals?.....

Out-Of-State Only

Have you camped in Montana in other years? Yes..... No.....

If yes, when?..... Where?.....

Montana Only

Have you or do you expect to make other camping trips in Montana this year? Yes..... No.....

If yes, where?..... If yes, how many days do you expect you will have camped out this summer in Montana?

Proceed to page 6. In directing general discussion attempt to find out interviewee's opinion of camping facilities in Montana, as well as other information.

ATTENTION TOURISTS

This summer Montana State University faculty members are making a study of travel in our state. We would like to know more about this important segment of our economic life. Would you kindly fill out this questionnaire for us?

It will take only 10 minutes of your time and will help our state a great deal. It is not necessary for you to sign your name. Place the completed questionnaire in the attached addressed and stamped envelope and leave at motel office.

Thank you! Have a pleasant trip home.

WILLIAM S. PETERS JOHN S. WRIGHT
Associate Professors of Business Administration
Montana State University
Co-Directors
Montana State University Tourist Survey

Are you travelling by car?..... Yes..... No.....
 If no, what means of travel are you using?.....
 In what state is the car registered?.....
 How many people are there in your party, that is, travelling in your car?..... (Number)

What is the occupation of the head of the family?.....

What is, or was, your principal destination on this trips?

About how much money did you budget for this trip?

How many days have you planned on being away from home on this entire trip?.....

How many nights will you stay in Montana?.....

What is the farthest point away from home you will have reached on this trip?.....

What places do you feel are the high points of your trip?

OUT-OF-STATE TOURISTS ONLY

Here is a list of things some people do while on vacation. Check those activities your party has done or are planning to do in Montana:

General Sightseeing.....	Visiting Historic Places	Attending rodeos and
Hiking or Walking.....	and Markers.....	Horseshows.....
Shopping.....	Water Sports—Boating,	Watching for rocks, flowers,
Fishing.....	Swimming, etc.....	Animals, Birds.....
Taking Pictures and	Camping.....	Other Sports
Snapshots.....	Horseback Riding.....	(Golf, Tennis, etc.).....
Others (specify).....		

In choosing your route in Montana, which of the following were important to you? Speed....., Scenery....., Less Traffic....., Better Roads......

Did you receive help from anyone in planning your route? Yes..... No.....

On an average, how many miles a day do you usually travel?

How many miles did you travel today?.....

What is your travel pattern in Montana? That is, are you driving hard one or two days, then relaxing in one spot, or are you driving about the same number of miles every day?.....

We are interested in learning what it costs people to vacation in Montana. Can you tell us what you spent YESTERDAY for: (In dollars and cents)

Lodgings \$....., Food bought in Grocery Stores \$.....,
 Car operation . . . gas, oil, etc. \$....., Meal in Cafes or Restaurants \$.....,
 Other Purchases and Expenses (souvenirs, gifts, admissions, entertainment, etc.) \$.....

In general, what do you figure it costs your party per day when on a vacation trip such as this one?

MONTANA STATE UNIVERSITY

Missoula

September 2, 1958

Bureau of Business and Economic Research

Dear Mr.

We want to thank you for participating in our study of Montana's tourist industry. We appreciate the help you extended to our field interviewer earlier this summer.

The short question form enclosed is designed to fill a "missing link" in the survey. This is a very brief summary of early season versus late season tourist business. We hope you will take the few moments needed to fill in and return the question form. We assure you again that all information relating to your business specifically will be held in strictest confidence.

Our survey work among tourists and tourist establishments is nearly complete. Most of the fall will be spent studying the information. Plans are being made for making the results available to interested persons like yourself sometime after the first of the year.

Sincerely yours,
William S. Peters and John S. Wright
Co-Directors, Montana Tourist Survey

Enclosure

SUPPLEMENTARY OCCUPANCY SURVEY

Our interviewer talked with you about your occupancy rate from the beginning of the season to..... How has your weekly **tourist business** from..... until now compared with tourist business before.....? (Check one)

- | | |
|--|--|
|up to 10 per cent better |up to 10 per cent slower |
|10 to 20 per cent better |10 to 20 per cent slower |
|20 to 40 per cent better |20 to 40 per cent |
|40 to 60 per cent better |40 to 60 per cent slower |
|Over 60 per cent better
(Please indicate percentage) |over 60 per cent slower
(Please indicate percentage) |
|about the same | |

This year how has your August tourist business compared with July?

August better by:

-up to 10 per cent
-10 to 20 per cent
-20 to 40 per cent slower
-40 to 60 per cent
-Over 60 per cent
(Please specify percentage)

July better by:

-up to 10 per cent
-10 to 20 per cent
-20 to 40 per cent
-40 to 60 per cent
-Over 60 per cent
(Please specify percentage)

.....about the same

How does your August business usually compare with July?.....

.....

Please use the remaining space for any comments you care to make about this year's tourist season, or the problems you feel are faced by the tourist business in Montana generally

MONTANA STATE HIGHWAY COMMISSION
PLANNING SURVEY DIVISION
1958 TOURIST INTERVIEW FORM

INTERVIEWER _____

1. Station _____ Direction of travel _____ 1-3
2. Date: Month _____ Date _____ Hour Beginning _____ 4-9
3. Are you on vacation _____ Business _____ Pleasure _____ *Other _____ 10
4. Where is your home: City _____ State _____ 11-14
5. When did you leave home: Month _____ Date _____ 16-19
6. When will you return home: Month _____ Date _____ 20-23
7. Where is the farthest point of travel from home: _____ 24-28
PLACE STATE
8. Where did you enter or leave Montana: _____ 29-31
HIGHWAY CITY
9. Where did this trip start today: _____ 32-36
PLACE STATE
10. Where do you intend to stop tonight: _____ 37-41
PLACE STATE
11. Where is the principal objective of today's trip: _____ 42-46
PLACE STATE
12. Where is the principal objective of entire trip: _____ 47-51
PLACE STATE
13. How many days did or will you spend in Montana: _____ 52-54
14. What type of lodging did you use: _____ 55-56

Last Night

Previous Night

1. Motel
2. Hotel
3. Tourist Rooms
4. Camping
5. Friends
6. Relatives
7. Home
8. Other (State)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

15. What is your estimated cost per day per party for meals & lodging: _____ 57-59
16. Observation only: 70-71
- State of license _____ Montana County Number _____ 60-63
- Number of Males: Adult _____ Under 18 _____ 64-65
- Number of Females: Adult _____ Under 18 _____ 66-67
1. House trailer _____ 2. Camping trailer _____ 3. Camping rack _____ 4. Boat _____ 68
17. Coding only:
- Number of days spent on entire trip (see dates above) _____ 69-71
- Number of miles traveled entire trip _____ 72-76
- Number of miles traveled in Montana _____ 77-80
- * Describe other purpose: _____

MONTANA ROOM